EXECUTIVE COMMITTEE AGENDA

Date: **Friday, November 16, 2018**
Time: **8:00 A.M.**
Place: **CareerSource Research Coast**
584 NW University Blvd., Suite 100
Port St. Lucie, Florida 34986
866-482-4473 ext. 428

https://www3.gotomeeting.com/join/110727014
Dial 1 888 999 0073
Access Code: 110-727-014

1. Welcome & Attendance
2. Declarations of Conflict of Interest

** 3. Review and Approve Draft Audit of Financial Statements

** 4. Review and Approve September Financials

** 5. Review and Approve WIOA Youth Literacy and Numeracy Policy

** 6. Review and Approve WIOA Youth Measureable Skills Gains Policy

** 7. Amendments andUpdates to Workforce Innovation & Opportunity Act (WIOA) Policies

** 8. Amendments and Updates to Welfare Transition (WT) Program Policies

** 9. Amendment and Update to the Supplemental Nutrition Assistance Program (SNAP) Requirements Policy

INFORMATION/DISCUSSION ONLY

10. CSRC PY 2018 – 2020 Local performance Levels Negotiation Response
11. Other Business
12. Set Agenda Items for Next Meeting – December 14, 2018
13. Set Agenda Item for Board of Directors Meeting – Decmber 19, 2018
14. Adjournment

**** Indicates possible voting item and open for public comment**

CareerSource RESEARCH COAST

AGENDA ITEM #3

AGENDA ITEM SUMMARY

TITLE:	2017-2018 Draft Audit of Financial Statements
STRATEGIC GOAL:	Optimal Use of Resources
POLICY/PLAN/LAW:	Workforce Innovation & Opportunity Act
ACTION REQUESTED:	Review 2017-2018 Draft of Audited Financial Statements
BACKGROUND:	Each year, CSRC receives an audit report from its auditing firm. A representative from James Moore & Company, will be presenting to the Executive Committee the draft audit of financial statements report. The CSRC Board of Directors are required to officially approve the audit report. Our Administrative Plan requires that the Executive Committee review the report. After review by the Executive Committee, a representative of James Moore & Company will present the audit of financial statements at the Board meeting on December 19, 2018.
STAFF RECOMMENDATION:	Review and Approve Draft Audit of Financial Statements
SUPPORTING MATERIALS:	Draft Audit of Financial Statements
BOARD STAFF:	Lisa Delligatti, Chief Financial Officer ldelligatti@careersourcerc.com 866-482-4473 ext. 430

James Moore
Certified Public Accountants and Consultants

October 22, 2018

To the Board of Directors of
Workforce Development Board of the Treasure Coast, Inc.:

We have audited the financial statements of the Workforce Development Board of the Treasure Coast, Inc. (the Organization) as of and for the year ended June 30, 2018, and have issued our report thereon dated October 22, 2018. Professional standards require that we advise you of the following matters relating to our audit.

Our Responsibility in Relation to the Financial Statement Audit

As communicated in our engagement letter dated May 25, 2017, our responsibility, as described by professional standards, is to form and express an opinion about whether the financial statements that have been prepared by management with your oversight are presented fairly, in all material respects, in conformity with accounting principles generally accepted in the United States of America. Our audit of the financial statements does not relieve you or management of your respective responsibilities.

Our responsibility, as prescribed by professional standards, is to plan and perform our audit to obtain reasonable, rather than absolute, assurance about whether the financial statements are free of material misstatement. An audit of financial statements includes consideration of internal control over financial reporting as a basis for designing audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control over financial reporting. Accordingly, as part of our audit, we considered the internal control of the Organization solely for the purpose of determining our audit procedures and not to provide any assurance concerning such internal control.

We are also responsible for communicating significant matters related to the audit that are, in our professional judgment, relevant to your responsibilities in overseeing the financial reporting process. However, we are not required to design procedures for the purpose of identifying other matters to communicate to you.

We have provided our findings regarding significant control deficiencies over financial reporting and material noncompliance, and other matters noted during our audit in a separate letter to you dated October 22, 2018.

Planned Scope and Timing of the Audit

We conducted our audit consistent with the planned scope and timing we previously communicated to you.

Compliance with All Ethics Requirements Regarding Independence

The engagement team, others in our firm, as appropriate, and our firm have complied with all relevant ethical requirements regarding independence. We have applied safeguards related to our preparation of the Organization's financial statements, including, but not limited to, an assessment of management's skills, knowledge, and experience.

Qualitative Aspects of the Entity's Accounting Practices

Significant Accounting Policies

Management has the responsibility to select and use appropriate accounting policies. A summary of the significant accounting policies adopted by the Workforce Development Board of the Treasure Coast, Inc. is included in Note 1 to the financial statements. There has been no initial selection of accounting policies and no changes in significant accounting policies or their application during 2018. No matters have come to our attention that would require us, under professional standards, to inform you about (1) the methods used to account for significant unusual transactions and (2) the effect of significant accounting policies in controversial or emerging areas for which there is a lack of authoritative guidance or consensus.

Significant Accounting Estimates

Accounting estimates are an integral part of the financial statements prepared by management and are based on management's current judgments. Those judgments are normally based on knowledge and experience about past and current events and assumptions about future events. Certain accounting estimates are particularly sensitive because of their significance to the financial statements and because of the possibility that future events affecting them may differ markedly from management's current judgments.

The most sensitive accounting estimates affecting the financial statements are:

> Management's estimate of useful lives for depreciation was based on past history within each capital asset class. We evaluated the key factors and assumptions used to develop the useful lives in determining that it is reasonable in relation to the financial statements taken as a whole and in relation to the applicable opinion units.

Financial Statement Disclosures

Certain financial statement disclosures involve significant judgment and are particularly sensitive because of their significance to financial statement users. There are no such disclosures affecting the financial statements at June 30, 2018.

Significant Difficulties Encountered during the Audit

We encountered no significant difficulties in dealing with management relating to the performance of the audit.

Uncorrected and Corrected Misstatements

For the purposes of this communication, professional standards require us to accumulate all known and likely misstatements identified during the audit, other than those that we believe are trivial, and communicate them to the appropriate level of management. Further, professional standards required us to also communicate the effect of uncorrected misstatements related to prior periods on the relevant classes of transactions, account balances or disclosures, and the financial statements as a whole and each applicable opinion unit. The following summarizes uncorrected financial statement misstatements whose effects in the current and prior periods, as determined by management, are immaterial, both individually and in the aggregate, to the financial statements taken as a whole and each applicable opinion unit:

- $38,000 adjustment to accrue expenses and related grant revenue at year-end.

In addition, professional standards require us to communicate to you all material, corrected misstatements that were brought to the attention of management as a result of our audit procedures. None of the misstatements identified by us as a result of our audit procedures and corrected by management were material, either individually or in the aggregate, to the financial statements taken as a whole or applicable opinion units.

Disagreements with Management

For purposes of this letter, professional standards define a disagreement with management as a matter, whether or not resolved to our satisfaction, concerning a financial accounting, reporting, or auditing matter, which could be significant to the financial statements or the auditors' report. No such disagreements arose during the course of our audit.

Representations Requested from Management

We have requested certain written representations from management, which are included in the attached management representation letter dated October 22, 2018.

Management Consultations with Other Accountants

In some cases, management may decide to consult with other accountants about auditing and accounting matters. Management informed us that, and to our knowledge, there were no consultations with other accountants regarding auditing and accounting matters.

Other Significant Matters, Findings, or Issues

In the normal course of our professional association with the Workforce Development Board of the Treasure Coast, Inc., we generally discuss a variety of matters, including the application of accounting principles and auditing standards, operating and regulatory conditions affecting the entity, and operational plans and strategies that may affect the risks of material misstatement. None of the matters discussed resulted in a condition to our retention as auditors.

Other Information in Documents Containing Audited Financial Statements

Pursuant to professional standards, our responsibility as auditors for other information in documents containing Workforce Development Board of the Treasure Coast, Inc.'s audited financial statements does not extend beyond the financial information identified in the audit report, and we are not required to perform any procedures to corroborate such other information. However, in accordance with such standards, we have:

> We have made certain inquiries of management and evaluated the form, content, and methods of preparing the information to determine that the information complies with accounting principles generally accepted in the United States of America, the method of preparing it has not changed from the prior period, and the information is appropriate and complete in relation to our audit of the financial statements. We compared and reconciled the required supplementary information to the underlying accounting records used to prepare the financial statements or to the financial statements themselves.

Our responsibility also includes communicating to you any information which we believe is a material misstatement of fact. Nothing came to our attention that caused us to believe that such information, or its manner of presentation, is materially inconsistent with the information, or manner of its presentation, appearing in the financial statements.

This report is intended solely for the information and use of the Board of Directors and management of Workforce Development Board of the Treasure Coast, Inc. and is not intended to be and should not be used by anyone other than these specified parties.

Very truly yours,

James Moore & Co., P.L.

JAMES MOORE & CO., P.L.

WORKFORCE DEVELOPMENT BOARD OF THE TREASURE COAST, INC.

FINANCIAL STATEMENTS

JUNE 30, 2018 AND 2017

WORKFORCE DEVELOPMENT BOARD OF THE TREASURE COAST, INC.
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JUNE 30, 2018 AND 2017

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INDEPENDENT AUDITORS' REPORT

To the Board of Directors and Management,
Workforce Development Board of the Treasure Coast, Inc.:

Report on the Financial Statements

We have audited the accompanying financial statements of the governmental activities and the general fund of Workforce Development Board of the Treasure Coast, Inc., (the Organization), as of and for the years ended June 30, 2018 and 2017, and the related notes to the financial statements, which collectively comprise the Organization's basic financial statements as listed in the table of contents.

Management's Responsibility for the Financial Statements

The Organization's management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditors' Responsibility

Our responsibility is to express opinions on these financial statements based on our audits. We conducted our audits in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinions.

Opinions

In our opinion, the financial statements referred to above present fairly, in all material respects, the respective financial position of the governmental activities and the general fund of the Organization, as of June 30, 2018 and 2017, and the respective changes in financial position for the years then ended in accordance with accounting principles generally accepted in the United States of America.

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Other Matters

Required Supplementary Information

Accounting principles generally accepted in the United States of America require that the management's discussion and analysis, as listed in the table of contents, be presented to supplement the basic financial statements. Such information, although not a part of the basic financial statements, is required by the Governmental Accounting Standards Board, who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context. We have applied certain limited procedures to the required supplementary information in accordance with auditing standards generally accepted in the United States of America, which consisted of inquiries of management about the methods of preparing the information and comparing the information for consistency with management's responses to our inquiries, the basic financial statements, and other knowledge we obtained during our audit of the basic financial statements. We do not express an opinion or provide any assurance on the information because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance.

Other Information

Our audits were conducted for the purpose of forming an opinion on the financial statements as a whole. The accompanying Schedule of Expenditures of Federal Awards is presented for purposes of additional analysis as required by the audit requirements of Title 2 U.S. Code of Federal Regulations (CFR) Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance) and is not a required part of the financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the financial statements. The information has been subjected to the auditing procedures applied in the audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the Schedule of Expenditures of Federal Awards is fairly stated in all material respects in relation to the financial statements as a whole.

Other Reporting Required by *Government Auditing Standards*

In accordance with *Government Auditing Standards*, we have also issued our report dated October 22, 2018, on our consideration of the Organization's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the Organization's internal control over financial reporting and compliance.

James Moore & Co., P.L.

Daytona Beach, Florida
October 22, 2018

MANAGEMENT'S DISCUSSION & ANALYSIS

This discussion and analysis of the Organization's financial performance provides an overview of the Organization's financial activities for the fiscal years ended June 30, 2018, 2017, and 2016. Please read it in conjunction with the Organization's financial statements, which follow this section.

OVERVIEW OF THE BASIC FINANCIAL STATEMENTS

This annual report contains government-wide financial statements that report on the Organization's activities as a whole and fund financial statements that report on the Organization's individual fund.

Government-wide Financial Statements

The first financial statement presented is the Statement of Net Position. This statement includes all of the Organization's assets and liabilities using the accrual basis of accounting. Accrual accounting is similar to the accounting used by most private-sector companies. Assets and related revenue are recorded when earned and related liabilities and expenses are recognized as incurred regardless of when cash is received or paid. Net Position, the difference between assets and liabilities, can be used to measure the Organization's financial position.

The second financial statement presented is the Statement of Activities. This statement is also shown using the accrual basis of accounting. It shows the increases and decreases in net position during the fiscal year. Over time, the increases or decreases in net position are useful indicators as to whether the Organization's financial health is improving or deteriorating. However, other non-financial factors, such as changes in federal and state funding, must also be considered when assessing the overall health of the Organization. In these statements, all of the Organization's activities are considered to be governmental activities.

Fund Financial Statements

Following the government-wide financial statements are the fund financial statements. They provide more detailed information about the Organization's fund.

- Governmental Fund – The Organization maintains one individual governmental fund. The General Fund is considered to be a major fund and, accordingly, is displayed separately. This fund is accounted for using modified accrual accounting. Modified accrual accounting focuses on available cash and other financial assets that can readily be converted to cash. This provides a shorter-term view of the governmental fund's financial position. A reconciliation of the governmental fund balance and net position is provided with this statement, which helps to explain the difference between the fund financial statements and the government-wide financial statements.

CONDENSED FINANCIAL INFORAMTION

The following table presents condensed, government-wide current and prior year data about net position and changes in the net position.

Net Position	2018	2017	2016
Assets:			
Current assets	$ 1,024,605	$ 818,346	$ 974,042
Capital assets, net	190,240	181,652	205,412
Total assets	1,214,845	999,998	1,179,454
Liabilities:			
Current liabilities	785,676	640,642	657,709
Net Position:			
Investment in capital assets	190,240	181,652	205,412
Unrestricted	245,909	177,704	316,333
Total net position	$ 429,169	$ 359,356	$ 521,745
Change in Net Position			
Program revenues:			
Operating grants and contributions	$ 7,130,140	$ 6,811,045	$ 7,873,644
Charges for services	88,809	62,589	84,917
Total program revenues	7,218,949	6,873,634	7,958,561
General revenues:			
Investment income	61	48	46
Total revenues	7,219,010	6,873,682	7,958,607
Program expenses:			
Training, retraining, and readjustment	7,149,197	7,036,071	7,921,096
Total program expenses	7,149,197	7,036,071	7,921,096
Change in net position	69,813	(162,389)	37,511
Beginning net position	359,356	521,745	484,234
Ending net position	$ 429,169	$ 359,356	$ 521,745

OVERALL FINANCIAL POSITION AND RESULTS OF OPERATIONS

Governmental Activities

In Program Year 2018, governmental activities generated $7,218,949 in program revenues and incurred $7,149,197 of program expenses. This resulted in a $69,813 increase in net position. This increase is the result of increased revenues relating to the Board's charges for services and reallocated WIOA Youth expenditures. In addition, there was an increase in the sub recipient expenditures and accrual for the program year. Grant revenue and expenditures have increased as compared to Program Year 2017 due to a $61,199 increase in WIOA cluster funds offset by a $142,237 (25%) decrease in Employment Services cluster funds, a $858,237 (746%) increase in WIOA National Dislocated Worker/National Emergency Hurricane Irma funds, a $426,208 (27%) decrease in Welfare Transition cluster funds, a $8,749 (24.5%) decrease in Unemployment Compensation funds and a $23,939 (37.9%) decrease in Trade Adjustment Training, Case Management and Administration funds. The increase in expenditures in Program Year 2018 compared to Program Year 2017 is a result of the increase in grant funding causing a increase in salaries and other program related expenses.

In Program Year 2017, governmental activities generated $6,873,682 in program revenues and incurred $7,036,071 of program expenses. This resulted in a $162,389 decrease in net position. This decrease is the result of decreased revenues relating to the Board's charges for services and increased expenditures relating to the updating of the Work Certified program. In addition, there was an increase in the sub recipient expenditures and accrual for the program year. Grant revenue and expenditures have decreased as compared to Program Year 2016 due to a $120,566 (8.53%) decrease in WIOA cluster funds offset by a $50,174 (13%) increase in Employment Services cluster funds, a $45,802 (3.23%) decrease in Welfare Transition cluster funds, a $3,105 (7.99%) decrease in Unemployment Compensation funds and a $13,147 (5.87%) decrease in Trade Adjustment Training, Case Management and Administration funds. The decrease in expenditures in Program Year 2017 compared to Program Year 2016 is a result of the decrease in grant funding causing a decrease in salaries and other program related expenses.

THE ORGANIZATION'S INDIVIDUAL FUND

General Fund

The General Fund receives its funding under cash advance and cost reimbursement contracts. If at the end of the fiscal year, an advance is not sufficient to cover applicable expenditures, a receivable is created. If an advance is in excess of applicable expenditures, a refundable advance is reported. Consequently, revenues will generally equal expenditures with a small profit due to charges for services not funded by grants. The fund balance represents amounts received prior to the Job Training Partnership Act (JTPA) from performance grants and other charges for services.

The $61,986 increase in fund balance for the current year is a result of a correction for reallocation of accrued leave in Program Year 17 and the reallocation of prior year's accrual of WIOA Youth sub recipient expenditures in excess of funding.

The $146,122 reduction in fund balance for Program Year 2017 is a result of a reallocation of accrued leave and the accrual of WIOA Youth sub recipient expenditures in excess of current funding which were reallocated to unrestricted funding. These expenditures will be recouped in the subsequent program year as a result of budget allocations.

Budgetary Highlights

The Organization is not legally required to adopt a budget. As such, budgetary exhibits are not presented.

CAPITAL ASSETS AND DEBT ADMINISTRATION

Capital Assets

The Organization's capital assets consist of computer equipment, office equipment and improvements and vehicles needed to support the One-Stop Centers in its region. Three vehicles are mobile units which are currently being used as One-Stop (Resource) Centers in Martin and Indian River Counties.

Capital assets, primarily consisting of computers, communication equipment, vehicles and leasehold improvements were increased by $33,258 in 2018 but no increase in 2017. For the years ending June 30, 2018, 2017, and 2016, depreciation was $24,670, $23,760, and $30,743, respectively. At June 30, 2018, 2017, and 2016, accumulated depreciation was $614,861, $746,862, and $765,026, respectively. Capital retirements of older, similar assets were $156,671 in 2018 and $41,924 in 2017. These assets were fully depreciated.

Debt Administration

The Organization has no debt.

ECONOMIC FACTORS

Ninety-five percent (95%) of the Organization's revenues were generated from federal grants, all of which were passed through the State of Florida's Department of Economic Opportunity. Anything that could influence federal and state appropriations of these funds will have a direct impact on the Organization.

CONTACTING THE ORGANIZATION'S FINANCIAL MANAGEMENT

This financial report is designed to provide a general overview of the Organization's finances and to show the Organization's accountability for the money it receives. If you have any questions about this report or need additional financial information, contact Brian Bauer, President/CEO, Workforce Development Board of the Treasure Coast, Inc. 584 NW University Blvd, Suite 100, Port St. Lucie, Florida, 34986.

WORKFORCE DEVELOPMENT BOARD OF THE TREASURE COAST, INC.
STATEMENTS OF NET POSITION
JUNE 30, 2018 AND 2017

	2018	2017
ASSETS		
Current assets		
Cash and cash equivalents	$ 546,058	$ 608,724
Grants and other receivables	297,785	66,199
Prepaids and other assets	180,762	143,423
Total current assets	1,024,605	818,346
Non-current assets		
Capital assets		
Leasehold improvements	217,856	217,856
Equipment	139,859	263,272
Vehicles	447,386	447,386
Less: Accumulated depreciation	(614,861)	(746,862)
Total non-current assets	190,240	181,652
Total Assets	$ 1,214,845	$ 999,998
LIABILITIES AND NET POSITION		
Current liabilities		
Accounts payable and accrued liabilities	$ 467,676	$ 422,299
Unearned revenue	318,000	218,343
Total current liabilities	785,676	640,642
Net position		
Investment in capital assets	190,240	181,652
Unrestricted	238,929	177,704
Total net position	429,169	359,356
Total Liabilities and Net Position	$ 1,214,845	$ 999,998

The accompanying notes to the financial statements
are an integral part of these statements.

WORKFORCE DEVELOPMENT BOARD OF THE TREASURE COAST, INC.
STATEMENTS OF ACTIVITIES
FOR THE YEARS ENDED JUNE 30, 2018 AND 2017

	2018				
		Program Revenues			
	Expenses	Charges for Services	Operating Grants and Contributions	Capital Grants and Contributions	Net (Expense) Revenues and Changes in Net Position-Governmental Activities
Functions and Programs					
Governmental Activities					
Training, retraining, and readjustment	$ 7,149,197	$ 88,809	$ 7,130,140	$ -	$ 69,752
General revenues					
Investment income					61
Total general revenues					61
Changes in net position					69,813
Net position, beginning of year					359,356
Net position, end of year					$ 429,169

	2017				
		Program Revenues			
	Expenses	Charges for Services	Operating Grants and Contributions	Capital Grants and Contributions	Net (Expense) Revenues and Changes in Net Position-Governmental Activities
Functions and Programs					
Governmental Activities					
Training, retraining, and readjustment	$ 7,036,071	$ 62,589	$ 6,811,045	$ -	$ (162,437)
General revenues					
Investment income					48
Total general revenues					48
Changes in net position					(162,389)
Net position, beginning of year					521,745
Net position, end of year					$ 359,356

The accompanying notes to financial statements
are an integral part of these statements.

WORKFORCE DEVELOPMENT BOARD OF THE TREASURE COAST, INC.
BALANCE SHEETS – GOVERNMENTAL FUND
JUNE 30, 2018 AND 2017

	General Fund	
	2018	2017
ASSETS		
Cash and cash equivalents	$ 546,058	$ 608,724
Grants and other receivables	297,785	66,199
Prepaids and other current assets	180,762	143,423
Total Assets	$ 1,024,605	$ 818,346
LIABILITIES AND FUND BALANCE		
Liabilities		
Accounts payable and accrued liabilities	$ 370,888	$ 333,252
Unearned revenue	318,000	218,343
Due to other governments	6,980	-
Total liabilities	695,868	551,595
Fund Balance		
Nonspendable:		
Prepaids and other current assets	180,762	143,423
Unassigned	147,975	123,328
Total fund balance	328,737	266,751
Total Liabilities and Fund Balance	$ 1,024,605	$ 818,346

The accompanying notes to the financial statements
are an integral part of these statements.

WORKFORCE DEVELOPMENT BOARD OF THE TREASURE COAST, INC.
RECONCILIATION OF THE BALANCE SHEETS – GOVERNMENTAL FUND
TO THE STATEMENTS OF NET POSITION OF GOVERNMENTAL ACTIVITIES
JUNE 30, 2018 AND 2017

	2018	2017
Total Governmental Fund Balance	$ 328,737	$ 266,751
Amounts reported for governmental activities in the statements of net position are different because:		
Capital assets used in governmental activities are not financial resources and, therefore, are not reported in the funds.		
Capital assets being depreciated	805,101	928,514
Accumulated depreciation on capital assets	(614,861)	(746,862)
Accrued compensated absences are not due and payable in the current period and, therefore are not reported in the funds	(89,808)	(89,047)
Net Position of Governmental Activities	$ 429,169	$ 359,356

The accompanying notes to the financial statements
are an integral part of these statements.

WORKFORCE DEVELOPMENT BOARD OF THE TREASURE COAST, INC.
STATEMENTS OF REVENUES, EXPENDITURES AND
CHANGES IN FUND BALANCE – GOVERNMENTAL FUND
FOR THE YEARS ENDED JUNE 30, 2018 AND 2017

	General Fund	
	2018	**2017**
Revenues		
Intergovernmental		
Federal grants	$ 6,851,569	$ 6,533,266
Local grants	278,071	277,779
Charges for services	89,309	62,589
Investment income	61	48
Total revenues	7,219,010	6,873,682
Expenditures		
Current		
Training, retraining, and readjustment	7,123,766	7,019,804
Capital outlay	33,258	-
Total expenditures	7,157,024	7,019,804
Net change in fund balance	61,986	(146,122)
Fund balance, beginning of year	266,751	412,873
Fund balance, end of year	$ 328,737	$ 266,751

The accompanying notes to the financial statements
are an integral part of these statements.

WORKFORCE DEVELOPMENT BOARD OF THE TREASURE COAST, INC.
RECONCILIATION OF THE STATEMENTS OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCE – GOVERNMENTAL FUND TO THE STATEMENTS OF ACTIVITIES
JUNE 30, 2018 AND 2017

	2018	2017
Net Change in Fund Balance - Total Governmental Fund	$ 61,986	$ (146,122)
Amounts reported for governmental activities in the Statement of Activities are different because:		
Compensated absences reported in the Statement of Activities do not require the use of current financial resources and, therefore, are not reported as expenditures of governmental funds. Expenses are reduced by amounts used during the year.	(761)	7,493
Governmental funds report capital outlays as expenditures. However, in the Statement of Activities, the cost of those assets is allocated over their estimated useful lives as depreciation expense.		
Capital outlay	33,258	-
Depreciation expense for the year	(24,670)	(23,760)
Change in Net Position of Governmental Activities	$ 69,813	$ (162,389)

The accompanying notes to the financial statements are an integral part of these statements.

(1) Summary of Significant Accounting Policies:

The following is a summary of the more significant accounting policies of Workforce Development Board of the Treasure Coast, Inc. (the Organization), which affect significant elements of the financial statements:

(a) **Reporting entity**—The Organization was organized on September 26, 1983 as a private non-profit corporation to develop workforce skills to meet current and future demands in Indian River, Martin, St. Lucie and Okeechobee counties within the State of Florida. Workforce development prepares individuals for work through secondary and post-secondary education, employer-sponsored training for incumbent workers, and special public programs for the poor and unemployed. The Organization receives its funding from federal and state grants passed primarily through the Florida Department of Economic Opportunity.

The accounting policies adopted by the Board conform to accounting principles generally accepted in the United States of America as applied to not-for-profit organizations reporting using the governmental model. As required by generally accepted accounting principles, the financial statements of the reporting entity include those of the Organization (the primary government). There were no entities that required inclusion as a component unit within the Organization's financial statements.

(b) **Government-wide and Fund Financial Statements**—The government-wide financial statements (the Statement of Net Position and the Statement of Activities) report information on all of the nonfiduciary activities of the Organization. Governmental activities are reported separately from business-type activities, which rely on fees charged to external parties as their primary revenues. The Organization has no business-type activities.

The Statement of Net Position reports the Organization's financial position as of the end of the fiscal year. In this statement, the Board's net position are reported in two categories: investment in capital assets and unrestricted net position.

The Statement of Activities is displayed using a net-cost format and reports the degree to which the direct expenses of a given function are offset by program revenues. Direct expenses are those that are clearly identifiable with a specific function. Indirect costs are included in the program expense reported for individual functions and activities. Program revenues include (1) charges for services that are directly related to a given function and (2) grants and contributions that are restricted to meeting the operational or capital requirements of a particular function. Other items not properly included among program revenues are reported instead as general revenues.

Separate financial statements are provided for the general fund, which is the Organization's only fund.

(1) **Summary of Significant Accounting Policies:** (Continued)

(c) **Measurement focus and basis of accounting**—The government-wide financial statements are reported using the economic resources measurement focus and the accrual basis of accounting. Revenues are recorded when earned and expenses are recorded when a liability is incurred, regardless of the timing of the related cash flows. Grants and similar items are recognized as revenue as soon as all eligibility requirements imposed by the provider have been met.

Governmental fund financial statements are reported using the current financial resources measurement focus and the modified accrual basis of accounting. Revenues are recognized as soon as they are both measurable and available. Revenues are considered available when they are collectible within the current period or soon enough thereafter to pay liabilities of the current period. For this purpose, the Board considers revenues to be available if they are collected within sixty days of the end of the current fiscal period. Expenditures generally are recorded when a liability is incurred, as under accrual accounting. However, expenditures related to compensated absences and claims and judgments, are recorded only when payment is due.

The Organization considers most revenues, such as reimbursement-based grant revenues and charges for service, to be susceptible to accrual and so they have been recognized as revenues in the current fiscal period. Other revenue items are considered to be measurable and available only when cash is received. When both restricted and unrestricted resources are available for use, it is the Board's policy to use restricted resources first, then unrestricted resources as they are needed.

Major Governmental Fund—The sole governmental fund used by the Organization is the general fund, which is used to account for all financial activity of the Organization.

(d) **Cash and cash equivalents**—Cash and cash equivalents of the Organization are considered to be cash on hand, demand deposits, and short-term investments with original maturities of three months or less from the date of acquisition.

(e) **Grants and other receivables**—Grants and other receivables consist of amounts due from grantor agencies for reimbursement of expenditures under various programs. Management has concluded that realization of losses on balance outstanding at year-end will be immaterial.

(f) **Capital assets and depreciation**—Capital assets are defined by the Board as assets with an initial, individual cost of $5,000 or more and an estimated useful life of more than one year. Such assets are recorded at historical cost. Donated capital assets are recorded at estimated acquisition value at the date of the donation. The Federal Government has a reversionary interest in those assets purchased with its funds which have a cost of $5,000 or more and an estimated useful life of at least one year. Depreciation of capital assets is computed using the straight-line method over estimated useful lives as follows:

Assets	Years
Leasehold improvements	30
Equipment	5–10
Vehicles	5

(1) **Summary of Significant Accounting Policies:** (Continued)

(g) **Unearned revenues**—Unearned revenues are comprised of amounts received from grantor agencies by the Board prior to meeting revenue recognition criteria. In subsequent periods, when the revenue recognition criteria have been met, the liability for unearned revenues is reduced and revenue is recognized.

(h) **Prepaids and other assets**—Certain payments to vendors reflect costs applicable to future accounting periods and are recorded as prepaids in both the government–wide and fund financial statements.

(i) **Indirect costs**—The Organization receives funds from several sources. Accordingly, indirect administrative and program support costs are allocated between the various programs in the following manner: Indirect administrative costs and indirect program support costs, including indirect salary costs, are charged to either an administrative or program cost pool and allocated to all programs including WTP, WIOA youth, WIOA adult, and WIOA dislocated workers contracts based on each program's direct program costs. Indirect occupancy costs are charged to a cost pool and allocated to all programs based on each program's direct program costs. Indirect occupancy costs are charged to various funding sources or indirect costs pools based on FTE's determined by bi-weekly personnel activity reports. The allocation ratios are determined based upon each program's percentage of total program costs.

(j) **Budgets**—The general expenditure authority of the Organization, as provided by Sections 445.004 and 445.007 of the Florida Statutes, does not require a legally adopted budget placed into public law. Accordingly, the budgetary comparison schedules for governmental funds have not been presented as supplementary information required by the Governmental Accounting Standards Board.

(k) **Income taxes**—The Organization is exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code, except for taxes on unrelated business income. Since the Organization had no taxable unrelated business income during the years ended June 30, 2018 and 2017, no provision for income taxes is provided in the financial statements.

Management of the Organization considers the likelihood of changes by taxing authorities in its filed income tax returns and recognizes a liability for or discloses potential significant changes that management believes are more likely than not to occur, including changes to the Organization's status as a not-for-profit entity. Management believes the Organization met the requirements to maintain its tax-exempt status and has no income subject to unrelated business income tax, therefore no provision for income taxes has been provided in these financial statements. The Organization's income tax returns for the past three years are subject to examination by tax authorities, and may change upon examination.

(1) **Summary of Significant Accounting Policies:** (Continued)

(l) **Fund balance**—In the fund financial statements, governmental funds report fund balance classifications that comprise a hierarchy based primarily on the extent to which the Organization is bound to honor constraints on the specific purposes for which amounts in those funds can be spent. Those classifications are as follows:

Nonspendable—Amounts that cannot be spent either because they are not in a spendable form or because they are legally or contractually required to be maintained intact.

Restricted—Amounts that can be spent only for specific purposes because of the Bylaws, state or federal laws, or externally imposed conditions by grantors or creditors.

Committed—Amounts that can be used only for specific purposes determined by a formal action by ordinance or resolution.

Assigned—Amounts that are designated by the Board of Directors for a specific purpose but are not spendable until a budget ordinance is passed by the Board of Directors.

Unassigned—All amounts not included in other spendable classifications.

When an expenditure is incurred for purposes for which both restricted and unrestricted fund balance is available, the Organization considers restricted funds to have been spent first. When an expenditure is incurred for which committed, assigned, or unassigned fund balances are available, the Organization considers amounts to have been spent first out of committed funds, then assigned funds, and finally unassigned funds, as needed, unless the Board of Directors has provided otherwise in its commitment or assignment actions.

(2) **Reconciliation of Government-Wide and Fund Financial Statements:**

(a) **Explanation of certain differences between the governmental fund balance sheets and the government-wide statements of net position**—Following the governmental fund balance sheets is a reconciliation between *fund balance – total governmental funds* and *net position of governmental activities* as reported in the government-wide statements of net position. The details of these differences are explained in the above referenced financial statements.

(b) **Explanation of certain differences between the governmental fund statements of revenues, expenditures, and changes in fund balance and the government-wide statements of activities**—Following the governmental fund statements of revenues, expenditures, and changes in fund balance, there is a reconciliation between *net change in fund balance – total governmental funds* and *change in net position of governmental activities* as reported in the government-wide statements of activities. The details of these differences are explained in the above referenced financial statements.

(3) **Capital Assets and Depreciation:**

Capital asset activity of the Organization for the 2018 and 2017 fiscal years was as follows:

2018 Governmental Activities	Balance June 30, 2017	Increases	Decreases	Balance June 30, 2018
Capital assets				
Leasehold improvements	$ 217,856	$ -	$ -	$ 217,856
Equipment	263,272	33,258	(156,671)	139,859
Vehicles	447,386	-	-	447,386
Total capital assets	928,514	33,258	(156,671)	805,101
Accumulated depreciation				
Leasehold improvements	(77,318)	(7,262)	-	(84,580)
Equipment	(241,465)	(8,162)	156,671	(92,956)
Vehicles	(428,079)	(9,246)	-	(437,325)
Total accumulated depreciation	(746,862)	(24,670)	156,671	(614,861)
Capital assets, net	$ 181,652	$ 8,588	$ -	$ 190,240

2017 Governmental Activities	Balance June 30, 2016	Increases	Decreases	Balance June 30, 2017
Capital assets				
Leasehold improvements	$ 217,856	$ -	$ -	$ 217,856
Equipment	305,196	-	(41,924)	263,272
Vehicles	447,386	-	-	447,386
Total capital assets	970,438	-	(41,924)	928,514
Accumulated depreciation				
Leasehold improvements	(70,055)	(7,263)	-	(77,318)
Equipment	(276,888)	(6,501)	41,924	(241,465)
Vehicles	(418,083)	(9,996)	-	(428,079)
Total accumulated depreciation	(765,026)	(23,760)	41,924	(746,862)
Capital assets, net	$ 205,412	$ (23,760)	$ -	$ 181,652

For the years ended June 30, 2018 and 2017, depreciation expense was $24,670 and $23,760 respectively, and was charged to economic environment

(4) **Operating Leases:**

The Board has entered into various operating leases for office space and equipment. Future minimum rental payments on these existing lease commitments are as follows:

Year ending June 30,	
2019	$ 684,114
2020	674,030
2021	616,827
2022	552,177
2023	568,445
Thereafter	4,295,051
	$ 7,390,644

For the years ended June 30, 2018 and 2017, rent expense was approximately $731,772 and $759,315 respectively.

(5) **Compensated Absences:**

Employees are entitled to vacation and sick leave according to the Organization's policies. Annual vacation is accrued based on completed years of employment with the Organization. Upon resignation, death, termination or retirement, employees are paid in one lump sum for accrued vacation as of the last day of employment. A maximum number of hours equivalent to the potential annual vacation leave the employee may accrue according to the Organization's policies may be carried over from one year to the next year. Accrued vacation leave in excess of what may be earned in a year will be forfeited. There is no liability for accumulated sick days since the Organization does not have a policy to pay any amounts when employees separate from service with the Organization. Compensated absences payable activity for each of the last two years is as follows:

Compensated Absences Payable	Beginning Balance	Additions	Reductions	Ending Balance	Due Within One Year
2018	$ 89,047	$ 88,977	$ 88,216	$ 89,808	$ 89,808
2017	$ 96,540	$ 87,502	$ 94,995	$ 89,047	$ 89,047

(6) **Retirement Plan:**

The Organization implemented a Safe Harbor 401(k) plan with an effective date of July 1, 2011, which covered employees, over 21 years of age, with a minimum of one year of service, and who worked 1,000 hours during the plan year. The plan allowed for a maximum matching contribution of 4% during 2018 and employees may make salary deferrals beginning after three months of employment. For the year ended June 30, 2018 and 2017, the Organization contributed $70,497 and $59,767 to the plan, respectively.

(7) **Risk Management:**

The Organization is exposed to various risks of loss related to torts; theft of, damage to and destruction of assets; errors and omissions; and natural disasters for which the Organization carries commercial insurance.

(8) **Concentrations of Credit Risk and Significant Funding Source:**

(a) **Cash and cash equivalents**—As of June 30, 2018 and 2017, the Organization had demand deposits with one financial institution of $599,505 and $720,313, respectively. The Organization has no policy requiring collateral or other security to support its deposits, although all demand deposits with banks are federally insured up to FDIC limitations. The demand deposits with the financial institutions are insured up to $500,000. At June 30, 2018 and 2017, the Organization had $99,505 and $220,313 in excess of FDIC coverage, respectively.

(b) **Grants and other receivables**—The Organization's receivables are for amounts due under contracts with the State of Florida and Federal government agencies. The Board has no policy requiring collateral or other security to support its receivables.

(c) **Significant funding source**—During the years ended June 30, 2018 and 2017, the Organization received approximately 95% of its funding from the United States Department of Labor, the United States Department of Health and Human Services, and the United States Department of Agriculture passed through the Department of Economic Opportunity. If a significant reduction in the level of this funding were to occur, it could have an adverse effect on the Organization's program and activities.

(9) **Contingencies:**

Amounts received or receivable from grantor agencies are subject to audit and adjustment by grantor agencies, principally the Federal government and the State of Florida. Any disallowed claims, including amounts already collected, may constitute a liability of the applicable funds. The amount, if any, of expenditures which may be disallowed by the grantor cannot be determined at this time although the Organization expects such amounts, if any, to be immaterial.

(10) **Related Parties:**

The Board of Directors includes representation of both the private and public service industries as required by Florida Statutes. The Organization had transactions with entities with which certain board members are associated for the purpose of providing training services to participants and temporary labor. During the year ended June 30, 2018 and 2017 total payments to these entities were $237,488 and $218,406, respectively. At June 30, 2018, $4,329 was payable to one of these entities. The transactions were approved and authorized in accordance with the Organization's purchasing policies and procedures.

(11) **Recent Accounting Pronouncements:**

The Governmental Accounting Standards Board ("GASB") has issued several pronouncements that have effective dates that may impact future financial statements. Listed below are pronouncements with required implementation dates effective for subsequent fiscal years that have not yet been implemented. Management has not currently determined what, if any, impact implementation of the following will have on the Organization's financial statements:

(a) GASB issued Statement No. 87, *Leases*, in June 2017. GASB 87 aims to better meet the information needs of financial statement users by improving accounting and financial reporting for leases by governments, including expanded disclosures of lease agreements and recording corresponding lease assets and liabilities. The provisions in GASB 87 are effective for periods beginning after December 15, 2019.

COMPLIANCE SECTION

INDEPENDENT AUDITORS' REPORT ON INTERNAL CONTROL OVER FINANCIAL REPORTING AND ON COMPLIANCE AND OTHER MATTERS BASED ON AN AUDIT OF FINANCIAL STATEMENTS PERFORMED IN ACCORDANCE WITH *GOVERNMENT AUDITING STANDARDS*

To the Board of Directors and Management,
Workforce Development Board of the Treasure Coast, Inc.:

We have audited, in accordance with auditing standards generally accepted in the United States of America and the standards applicable to the financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States, the financial statements of the governmental activities and the general fund of the Workforce Development Board of the Treasure Coast, Inc., (the Organization) as of and for the year ended June 30, 2018, and the related notes to the financial statements, which collectively comprise the Organization's basic financial statements, and have issued our report thereon dated October 22, 2018.

Internal Control over Financial Reporting

In planning and performing our audit, we considered the Organization's internal control over financial reporting (internal control) to determine the audit procedures that are appropriate in the circumstances for the purpose of expressing our opinions on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the Organization's internal control. Accordingly, we do not express an opinion on the effectiveness of the Organization's internal control.

A *deficiency in internal control* exists when the design or operation of a control does not allow management or employees in the normal course of performing their assigned functions, to prevent, or detect and correct misstatements on a timely basis. A *material weakness* is a deficiency, or a combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the entity's financial statements will not be prevented, or detected and corrected on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control over financial reporting was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control over financial reporting that might be material weaknesses or significant deficiencies and therefore, material weaknesses or significant deficiencies may exist that were not identified. Given these limitations, during our audit we did not identify any deficiencies in internal control over financial reporting that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

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Compliance and Other Matters

As part of obtaining reasonable assurance about whether the Organization's financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the determination of financial statement amounts. However, providing an opinion on compliance with those provisions was not an objective of our audit and, accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards.*

Purpose of this Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the entity's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the entity's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

James Moore & Co., P.L.

Daytona Beach, Florida
October 22, 2018

WORKFORCE DEVELOPMENT BOARD OF THE TREASURE COAST, INC.
SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS
FOR THE YEAR ENDED JUNE 30, 2018

Federal Grantor/Pass-Through Grantor/Program Title	Program Year	Federal CFDA Number	Funding Period	Total Expended	Transferred to Subrecipients
U.S. Department of Labor					
Passed through Florida Department of Economic Opportunity					
WIA/WIOA Cluster					
WIOA Adult Program	2017	17.258	7/01/16-6/30/18	$ 1,246,088	$ -
WIOA Adult Program	2017	17.258	1/01/18-6/30/20	1,290	-
WIOA Adult Program	2017	17.258	1/01/18-12/31/18	1,365	-
WIOA Adult Program	2016	17.258	7/01/18-12/31/18	170,651	-
WIOA Adult Program	2016	17.258	7/01/18-12/31/18	88,229	-
WIOA Adult Program	2016	17.258	7/01/18-12/31/18	35,635	-
WIOA Adult Program	2016	17.258	5/11/18-12/31/18	19,062	-
WIOA Adult Program	2015	17.258	7/1/16-12/31/17	156,544	-
WIOA Adult Program	2015	17.258	5/11/17-6/30/18	140,000	-
				1,858,864	-
WIOA Youth Activities	2017	17.259	4/01/17-6/30/19	1,040,057	807,812
WIOA Dislocated Worker Formula Grants	2017	17.278	7/01/17-6/30/19	1,184,196	-
WIOA Dislocated Worker Formula Grants	2016	17.278	7/01/16-6/30/18	116,774	-
WIOA Dislocated Worker Formula Grants	2017	17.278	8/27/17-6/30/18	30,627	-
				1,331,597	-
WIA/WIOA Cluster Total				4,230,518	-
Employment Services Cluster					
Employment Services / Wagner-Peyser Funded Activities	2017	17.207	7/01/17-9/30/18	153,775	-
Employment Services / Wagner-Peyser Funded Activities	2017	17.207	7/01/17-6/30/18	37,302	-
Employment Services / Wagner-Peyser Funded Activities	2016	17.207	7/01/16-9/30/17	60,034	-
Employment Services / Wagner-Peyser Funded Activities	2015	17.207	7/01/16-12/31/17	53,494	-
				304,605	-
Disabled Veteran's Outreach Program	2017	17.801	10/01/17-9/30/18	29,206	-
Disabled Veteran's Outreach Program	2017	17.801	7/01/17-9/30/17	13,645	-
Disabled Veteran's Outreach Program	2017	17.801	10/01/17-9/30/18	48,425	-
Disabled Veteran's Outreach Program	2017	17.801	7/1/17-9/30/17	18,933	-
				110,209	-
Employment Services Cluster Total				414,814	-
Unemployment Insurance	2017	17.225	7/01/17-11/30/17	6,282	-
Unemployment Insurance	2017	17.225	10/1/17-9/30/18	20,742	-
				27,024	-
Trade Adjustment Assistance	2017	17.245	7/01/17-9/30/18	23,953	-
Trade Adjustment Assistance	2017	17.245	7/01/17-6/30/18	1,951	-
Trade Adjustment Assistance	2016	17.245	10/01/16-9/30/17	13,367	-
				39,271	-
WIOA National Dislocated Worker Grants / WIA National Emergency Grants	2017	17.277	9/06/17-9/30/19	990,996	-
Total U.S. Department of Labor				5,702,623	-
U.S. Department of Health and Human Services					
Passed through Florida Department of Economic Opportunity					
Temporary Assistance for Needy Families	2017	93.558	10/01/17-6/30/18	711,580	-
Temporary Assistance for Needy Families	2017	93.558	7/01/17-12/31/17	262,680	-
Total U.S. Department of Health and Human Services and TANF Cluster				974,260	-
U.S. Department of Agriculture					
Passed through Florida Department of Economic Opportunity					
State Administrative Matching Grants for the Supplemental Nutrition Assistance Program	2017	10.561	10/01/17-9/30/18	123,107	-
State Administrative Matching Grants for the Supplemental Nutrition Assistance Program	2017	10.561	7/01/17-9/30/17	51,579	-
Total U.S. Department of Agriculture and SNAP Cluster				174,686	-
Total Expenditures of Federal Awards				$ 6,851,569	$ -

The accompanying notes to schedule of expenditures of federal awards are an integral part of this schedule.

WORKFORCE DEVELOPMENT BOARD OF THE TREASURE COAST, INC.
NOTES TO SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS
YEAR ENDED JUNE 30, 2018

(1) **Basis of Presentation:**

The accompanying Schedule of Expenditures of Federal Awards includes the Federal award activity of Workforce Development Board of the Treasure Coast, Inc. (the Organization) and is presented on the accrual basis of accounting. The information in this schedule is presented in accordance with the requirements of Title 2 U.S. Code of Federal Regulations Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance). Therefore, some amounts presented in this schedule may differ from amounts presented in, or used in the preparation of, the financial statements.

(2) **Summary of Significant Accounting Policies:**

Expenditures reported on the schedule are reported on the accrual basis of accounting. Such expenditures are recognized following the cost principles contained in the Uniform Guidance, wherein certain types of expenditures are not allowed or are limited as to reimbursement.

(3) **De Minimis Indirect Cost Rate Election:**

The Organization has elected not to use the 10 percent de minimis indirect cost rate as allowed under Uniform Guidance.

WORKFORCE DEVELOPMENT BOARD OF THE TREASURE COAST, INC.
SCHEDULE OF FINDINGS AND QUESTIONED COSTS
FOR THE YEAR ENDED JUNE 30, 2018

I. **Summary of Auditors' Results:**

Financial Statements:

Type of audit report issued on the financial statements:	*Unmodified*	
Internal control over financial reporting:		
Material weakness(es) identified?	____ yes	_X_ no
Significant deficiency(ies) identified?	____ yes	_X_ none reported
Noncompliance material to financial statements noted?	____ yes	_X_ no

Federal Awards:

Internal control over major Federal programs:		
Material weakness(es) identified?	____ yes	_X_ no
Significant deficiency(ies) identified?	____ yes	_X_ none reported
Type of auditor's report issued on compliance for major Federal programs:	*Unmodified*	
Any audit findings disclosed that are required to be reported in accordance with 2 CFR 200.516(a)?	____ yes	_X_ no

Identification of major Federal programs:

CFDA Number	Program Name
17.258, 17.259, 17.278	WIOA Cluster
17.277	WIOA National Dislocated Worker Grants / WIA National Emergency Grants

Dollar threshold used to distinguish between type A and type B Federal programs:	$750,000	
Auditee qualified as low-risk auditee?	____ yes	_X_ no

II. **Financial Statement Findings:** None.

III. **Federal Awards Findings and Questioned Costs:** None.

IV. **State of Florida, Department of Economic Opportunity Reporting Requirements:** The Organization performed timely reconciliations between the general ledger accounting system and the One Stop Management Information System.

V. **Federal Award Summary Schedule of Prior Year Findings:** There were no audit findings for the year ended June 30, 2017.

INDEPENDENT AUDITORS' REPORT ON COMPLIANCE FOR EACH MAJOR FEDERAL PROGRAM AND REPORT ON INTERNAL CONTROL OVER COMPLIANCE IN ACCORDANCE WITH THE UNIFORM GUIDANCE

To the Board of Directors and Management,
Workforce Development Board of the Treasure Coast, Inc.:

Report on Compliance for Each Major Federal Program

We have audited the Workforce Development Board of the Treasure Coast, Inc.'s (the Organization) compliance with the types of compliance requirements described in the U.S. *Office of Management and Budget (OMB) Compliance Supplement* that could have a direct and material effect on each of the Organization's major federal programs for the years ended June 30, 2018. The Organization's major federal programs are identified in the summary of auditors' results section of the accompanying schedule of findings and questioned costs.

Management's Responsibility

Management is responsible for compliance with the requirements of laws, regulations, contracts, and grants applicable to its federal programs.

Auditors' Responsibility

Our responsibility is to express an opinion on compliance for each of the Board's major federal programs based on our audit of the types of compliance requirements referred to above. We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America; the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States; the special audit guidance provided by the State of Florida Department of Economic Opportunity and the audit requirements of Title 2 U.S. Code of Federal Regulations (CFR) Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance). Those standards and the Uniform Guidance require that we plan and perform the audit to obtain reasonable assurance about whether noncompliance with the types of compliance requirements referred to above that could have a direct and material effect on a major federal program occurred. An audit includes examining, on a test basis, evidence about the Board's compliance with those requirements and performing such other procedures as we considered necessary in the circumstances.

We believe that our audit provides a reasonable basis for our opinion on compliance for each major federal program. However, our audit does not provide a legal determination of the Board's compliance.

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Opinion on Each Major Federal Program

In our opinion, the Organization complied, in all material respects, with the types of compliance requirements referred to above that could have a direct and material effect on each of its major federal programs for the year ended June 30, 2018.

Report on Internal Control over Compliance

Management of the Organization is responsible for establishing and maintaining effective internal control over compliance with the types of compliance requirements referred to above. In planning and performing our audit of compliance, we considered the Organization's internal control over compliance with the types of requirements that could have a direct and material effect on each major federal program as a basis for designing auditing procedures that are appropriate in the circumstances for the purpose of expressing an opinion on compliance for each major federal program and to test and report on internal control over compliance in accordance with the Uniform Guidance, but not for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, we do not express an opinion on the effectiveness of the Organization's internal control over compliance.

A *deficiency in internal control over compliance* exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct noncompliance with a type of compliance requirement of a federal program on a timely basis. A *material weakness in internal control over compliance* is a deficiency, or combination of deficiencies in internal control over compliance, such that there is a reasonable possibility that material noncompliance with a type of compliance requirement of a federal program will not be prevented, or detected and corrected on a timely basis. A *significant deficiency in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance with a type of compliance requirement of a federal program that is less severe than a material weakness in internal control over compliance, yet important enough to merit attention by those charged with governance.

Our consideration of internal control over compliance was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies. We did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of the Uniform Guidance. Accordingly, this report is not suitable for any other purpose.

James Moore & Co., P.L.

Daytona Beach, Florida
October 22, 2018

CareerSource RESEARCH COAST

AGENDA ITEM #4

AGENDA ITEM SUMMARY

TITLE:	Financial Statement Report
STRATEGIC GOAL:	Optimal Use of Resources
POLICY/PLAN/LAW:	Workforce Innovation & Opportunity Act: Role of LWDB's
ACTION REQUESTED:	Review and Approve September Financial Statements
BACKGROUND:	The Board approved the proposed budget for the 2018-2019 Program Year. The Executive Committee regularly reviews budgets, all amendments to the budget and monthly expenditures.
STAFF RECOMMENDATION:	Review and Approve the September Financial Statements
SUPPORTING MATERIALS:	Monthly Financial Statements
BOARD STAFF:	Lisa Delligatti, Chief Financial Officer ldelligatti@careersourcerc.com 866-482-4473 ext. 430

LWDB 20
Summary of Funding and Expenditures
September 30, 2018

PY 18-19 TOTAL AVAILABLE FUNDING	INDIRECT	ADULT	DW	YOUTH	WTP	RA (UC)	SNAP	WP	TAA	LVER	DVOP	CBSS	Supp WIOA State	FY 16-17 PI WIOA	FY 16-17 PI WP
PY 18-19 Allocations		$ 1,394,463	$ 987,918	$ 1,250,430	$ 1,050,719	$ 25,100	$ 163,514	$ 769,971	$ 52,049	$ 144,536	$ 202,362	$ 95,923	$ 127,562	$ 733,348	$ 125,141
PY 18-19 Supplemental		$ -	$ 304,295	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Unrestricted Funds Earned this year		$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Additional Funds		$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Retained by DEO for Merit Salaries		$ -	$ -	$ -	$ -	$ -	$ -	$ (488,670)	$ (22,973)	$ (97,165)	$ (131,311)	$ -	$ -	$ -	$ -
Carryforward to PY 19-20		$ -	$ (88,420)	$ (288,090)	$ -	$ (4,200)	$ (41,000)	$ (91,031)	$ (23,216)	$ -	$ -	$ -	$ -	$ -	$ -
Carryforward		$ -	$ 232,735	$ 102,700	$ -	$ 4,358	$ 41,458	$ 131,547	$ -	$ 10,970	$ 516	$ -	$ -	$ -	$ -
TOTAL	**$ -**	**$ 1,394,463**	**$ 1,436,528**	**$ 1,065,040**	**$ 1,050,719**	**$ 25,258**	**$ 163,972**	**$ 321,817**	**$ 5,860**	**$ 58,341**	**$ 71,566**	**$ 95,923**	**$ 127,562**	**$ 733,348**	**$ 125,141**
FUNDING DRAWN DOWN YTD	**INDIRECT**	**ADULT**	**DW**	**YOUTH**	**WTP**	**RA (UC)**	**SNAP**	**WP**	**TAA**	**LVER**	**DVOP**	**CBSS**	**Supp WIOA State**	**FY 16-17 PI WIOA**	**FY 16-17 PI WP**
PY 18-19 Allocations		**$ 309,169**	**$ 42,464**	**$ 111,191**	**$ 233,004**	**$ 4,358**	**$ 40,317**	**$ 122,485**	**$ 16,802**	**$ 10,668**	**$ 18,083**	**$ 73,730**	**$ 127,562**	**$ 147,119**	**$ 25,000**
PY 18-19 Supplemental		**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**
Retained by DEO for Merit Salaries		**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**
Unrestricted Funds Earned this year		**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**
Additional funds/Carryforward to PY 19-20		**$ -**	**$ -**	**$ 200**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**		**$ -**	**$ -**	**$ -**	**$ -**	**$ -**
Carryforward		**$ -**	**$ 232,735**	**$ 102,700**	**$ -**	**$ -**	**$ -**	**$ 32,981**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**
TOTAL		**$ 309,169**	**$ 275,199**	**$ 214,091**	**$ 233,004**	**$ 4,358**	**$ 40,317**	**$ 155,466**	**$ 16,802**	**$ 10,668**	**$ 18,083**	**$ 73,730**	**$ 127,562**	**$ 147,119**	**$ 25,000**
% of Total Budgeted Funding Received		**22.17%**	**19.16%**	**20.10%**	**22.18%**	**17.25%**	**24.59%**	**48.31%**	**286.71%**	**18.29%**	**25.27%**	**76.86%**	**100.00%**	**20.06%**	**19.98%**
EXPENDITURES															
Administrative	**$ (17,855)**	**$ 14,824**	**$ 5,343**	**$ 5,749**	**$ 13,691**	**$ 129**	**$ 3,563**	**$ 23,935**	**$ 37**	**$ 291**	**$ 635**	**$ 3,097**	**$ 11,687**	**$ 22,795**	**$ 100**
Salaries and Benefits	$ 61,603	$ -	$ -	$ -	$ -	$ -		$ -	$ -	$ -	$ -	$ -	$ -	$ 11,871	$ -
General and Administrative	$ 29,027	$ -	$ -	$ -	$ -	$ -		$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Allocated Indirect Costs	$ (108,484)	$ 47,911	$ 5,343	$ 5,749	$ 13,691	$ 129	$ 3,563	$ 2,535	$ 37	$ 291	$ 635	$ 3,097	$ -	$ 10,924	$ 100
Reclassification		$ (33,087)	$ -	$ -	$ -	$ -		$ 21,400	$ -	$ -	$ -	$ -	$ 11,687	$ -	$ -
Travel		$ -	$ -	$ -	$ -	$ -		$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Program Training	**$ (13,437)**	**$ 349,425**	**$ 60,952**	**$ 213,473**	**$ 156,637**	**$ 4,229**	**$ 40,694**	**$ 107,612**	**$ 959**	**$ 6,884**	**$ 14,947**	**$ 29,884**	**$ 115,875**	**$ 99,324**	**$ 962**
WIA Youth Contracts		$ -	$ -	$ 166,837	$ -	$ -	$ -	$ -	**$ -**	$ -	$ -	$ -	$ -	$ -	$ -
Salaries and Benefits	$ 49,367	$ 256,366	$ 39,690	$ 15,997	$ 100,623	$ -	$ 26,791	$ 8,967	$ 110	$ 714	$ 1,630	$ -	$ -	$ 90,949	$ -
Contract Labor	$ -	$ 1,544	$ 180	$ 1,550	$ 5,390	$ -	$ 625	$ 157	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Internship		$ -	$ -	$ -	$ -	$ -	$ -	$ -	**$ -**	$ -	$ -	$ -	$ -	$ -	$ -
Incentives/Stipends		$ -	$ -	$ -	$ 1,325	$ -	$ -	$ -	**$ -**	$ -	$ -	$ -	$ -	$ -	$ -
Support Services/ Participants		$ 589	$ -	$ -	$ 825	$ -	$ -	$ -	$ -	$ -	$ -	$ 2,930	$ -	$ -	$ -
Training-TAA		$ -	$ -	$ -	$ -	$ -		$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Training-ITA/OST		$ 54,580	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 24,839	$ -	$ -	$ -
Training-OJT		$ 61,523	$ 1,885	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Training-Cust./Employed Worker		$ 14,248	$ -	$ -	$ -	$ -		$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Work Experience/ Internships/ Participant Wages		$ -	$ -	$ -	$ -	$ -		$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Travel	$ 850	$ 1,131	$ 190	$ 9	$ 518	$ -	$ 355	$ 30	$ 0	$ 3	$ 111	$ -	$ -	$ -	$ -
One Stop Shared Costs		$ 68,401	$ 11,300	$ -	$ 29,011	$ 4,141	$ 8,453	$ 31,675	$ 822	$ 208	$ 12,213	$ -	$ -	$ -	$ -
Other Operating Expenses	$ 11,345	$ 30,533	$ 4,093	$ 24,958	$ 9,511	$ -	$ 2,110	$ 9,005	$ 1	$ 5,765	$ 562	$ -	$ -	$ -	$ 894
Allocated Program Indirect	$ (74,998)	$ 32,435	$ 3,613	$ 4,122	$ 9,434	$ 88	$ 2,361	$ 1,727	$ 25	$ 193	$ 430	$ 2,116	$ -	$ 8,375	$ 68
Reclassification		**$ (171,925)**	**$ -**	$ -	$ -	$ -	$ -	$ 56,050	$ -	$ -	$ -	$ -	$ 115,875	$ -	$ -
Total Expenditures	**$ (31,291)**	**$ 364,249**	**$ 66,294**	**$ 219,222**	**$ 170,328**	**$ 4,358**	**$ 44,257**	**$ 131,547**	**$ 996**	**$ 7,175**	**$ 15,582**	**$ 32,981**	**$ 127,562**	**$ 122,119**	**$ 1,062**
Funding Over/(under) expenditures	**$ 31,292**	**$ (55,080)**	**$ 208,905**	**$ (5,131)**	**$ 62,677**	**$ 0**	**$ (3,939)**	**$ 23,920**	**$ 15,807**	**$ 3,493**	**$ 2,501**	**$ 40,749**	**$ 0**	**$ 25,000**	**$ 23,938**
YTD % of Budgeted Funds Expended		**26.12%**	**4.61%**	**20.58%**	**16.21%**	**17.25%**	**26.99%**	**40.88%**	**16.99%**	**12.30%**	**21.77%**	**34.38%**	**100.00%**	**16.65%**	**0.85%**
Comments															

LWDB 20
Summary of Funding and Expenditures
September 30, 2018

PY 18-19 TOTAL AVAILABLE FUNDING	Pthways to Prosperity Pre-Appren	SSI Manufacturing Apprentice	Youth Build	FATES	Gov Chal Maria	SOS Youth	OTHER Non NFA	YEAR TO DATE TOTALS		
PY 18-19 Allocations	$ 467,552	$ 400,095	$ 420,555	$ 353,338	$ 18,635	$ -			$ 8,783,211	
PY 18-19 Supplemental	$ -	$ -	$ -	$ -	$ -				$ 304,295	
Unrestricted Funds Earned this year	$ -	$ -	$ -	$ -	$ -		$ 64,939		$ 64,939	
Additional Funds	$ -	$ -	$ -	$ -	$ -	$ 200,000			$ 200,000	
Retained by DEO for Merit Salaries	$ -	$ -	$ -	$ -	$ -				$ (740,119)	
Carryforward to PY 19-20	$ -	$ -	$ -	$ -	$ -				$ (535,957)	
Carryforward	$ -	$ -	$ -	$ -	$ -				$ 524,284	
TOTAL	**$ 467,552**	**$ 400,095**	**$ 420,555**	**$ 353,338**	**$ 18,635**	**$ 200,000**	**$ 64,939**	**$ -**	**$ 8,600,653**	

FUNDING DRAWN DOWN YTD	PP Appren	Manuf Appren	Youth Build	FATES	Gov Chal Maria	SOS Youth	OTHER Non NFA	PY 18-19 Actual	PY 18-19 Budget	VARIANCE	% Expended
PY 18-19 Allocations	**$ 34,865**	**$ 121,371**	**$ 42,085**	**$ 3,710**	**$ 485**	**$ -**	**$ -**	**$ 1,484,469**	**$ 8,783,211**	**$ 7,298,742**	**16.901%**
PY 18-19 Supplemental		**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ 304,295**	**$ 304,295**	**0.000%**
Retained by DEO for Merit Salaries	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ (740,119)**		
Unrestricted Funds Earned this year	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ 12,794**	**$ 12,794**	**$ 264,939**	**$ 252,145**	**4.829%**
Additional funds/Carryforward to PY 19-20	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ 200**	**$ (535,957)**	**$ (536,157)**	
Carryforward	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ 368,416**	**$ 524,284**	**$ 155,868**	**70.270%**
TOTAL	**$ 34,865**	**$ 121,371**	**$ 42,085**	**$ 3,710**	**$ 485**	**$ -**	**$ 12,794**	**$ 1,865,879**	**$ 8,600,653**	**$ 6,734,775**	**21.695%**
% of Total Budgeted Funding Received	**7.46%**	**30.34%**	**10.01%**	**1.05%**	**2.60%**						

EXPENDITURES								PY 18-19 Actual	PY 18-19 Budget	VARIANCE Under/(Over)	% Expended
Administrative	**$ 2,089**	**$ 6,225**	**$ 3,479**	**$ 221**	**$ 11**	**$ 439**	**$ 2,296**	**$ 102,782**	**$ 659,021**	**$ 556,239**	**15.60%**
Salaries and Benefits	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 73,474	$ 373,408	$ 299,934	19.677%
General and Administrative	$ -	$ -	$ -	$ -	$ -	$ -	$ 281	$ 29,308	$ 151,125	$ 121,817	19.393%
Allocated Indirect Costs	$ 2,089	$ 6,225	$ 3,479	$ 221	$ 11	$ 439	$ 2,015	$ (0)	$ 134,728	$ 134,728	0.000%
Reclassification	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	
Travel	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	
Program Training	**$ 23,615**	**$ 63,652**	**$ 40,304**	**$ 2,510**	**$ 133**	**$ 4,427**	**$ 20,656**	**$ 1,343,716**	**$ 7,941,632**	**$ 6,597,916**	**16.9%**
WIA Youth Contracts	$ -	$ -	$ 32,448	$ -	$ -	$ -		$ 199,286	$ 1,177,017	$ 977,731	16.9%
Salaries and Benefits	$ 16,523	$ 17,319	$ 4,179	$ 1,729	$ 94	$ -	$ 5,186	$ 636,234	$ 2,828,229	$ 2,191,995	22.5%
Contract Labor	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 9,446	$ 242,956	$ 233,510	3.9%
Internship	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	
Incentives/Stipends	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 1,325	$ 17,300	$ 15,975	7.7%
Support Services/ Participants	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 4,344	$ 98,107	$ 93,763	4.4%
Training-TAA	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 2,500	$ 2,500	0.0%
Training-ITA/OST	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 79,419	$ 553,383	$ 473,964	14.4%
Training-OJT	$ -	$ 36,131	$ -	$ -	$ -	$ -	$ -	$ 99,539	$ 505,586	$ 406,048	19.7%
Training-Cust./Employed Worker	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 14,248	$ 7,767	$ (6,481)	183.4%
Work Experience/ Internships/ Participant Wages	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 141,397	$ 141,397	0.0%
Travel	$ 42	$ 33	$ -	$ 9	$ 0	$ -	$ 88	$ 3,371	$ 34,445	$ 31,074	9.8%
One Stop Shared Costs	$ 2,769	$ 2,699	$ -	$ 615	$ 31	$ -	$ 1,680	$ 174,019	$ 576,004	$ 401,985	30.2%
Other Operating Expenses	$ 2,894	$ 3,279	$ 1,100	$ 15	$ 0	$ 4,097	$ 12,323	$ 122,486	$ 1,667,284	$ 1,544,798	7.3%
Allocated Program Indirect	$ 1,387	$ 4,190	$ 2,577	$ 142	$ 8	$ 330	$ 1,379	$ (0)	$ 89,658	$ -	
Reclassification	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 0	$ -	$ (0)	
Total Expenditures	**$ 25,704**	**$ 69,878**	**$ 43,783**	**$ 2,731**	**$ 144**	**$ 4,866**	**$ 22,952**	**$ 1,446,498**	**$ 8,600,654**	**$ 7,154,156**	**16.8%**
Funding Over/(under) expenditures	**$ 9,161**	**$ 51,493**	**$ (1,698)**	**$ 979**	**$ 341**	**$ (4,866)**	**$ (10,159)**	**$ 419,381**			
YTD % of Budgeted Funds Expended	**5.50%**	**17.47%**	**10.41%**	**0.77%**	**0.77%**	**2.43%**		**16.82%**			
Comments											

CareerSource RESEARCH COAST

AGENDA ITEM #5

AGENDA ITEM SUMMARY

TITLE: WIOA Youth Literacy and Numeracy Policy

STRATEGIC GOALS Operational Intelligence

POLICY/PLAN/LAW: Workforce Innovation & Opportunity Act (WIOA) Youth Regulations

ACTION REQUESTED: Review and Approve

BACKGROUND: The Workforce Innovation and Opportunity Act (WIOA) requires that applicants to the WIOA Youth program take a Literacy and Numeracy assessment at time of enrollment, or no more than six (6) months prior to enrollment. WIOA regulations also govern the enrollment of youth deemed as "basic skills deficient" at time of enrollment per assessment scores, and the administration of post-assessment tests prior to file closure.

LWDA 20 local policy will be to provide the TABE as the required pre and post assessment. In addition, a locator test will be administered to determine the appropriate TABE testing level for each youth.

STAFF RECOMMENDATION: Approve the WIOA Youth Literacy and Numeracy Policy

SUPPORTING MATERIALS: WIOA Youth Literacy and Numeracy Policy Draft

BOARD STAFF: Glenda Harden, Senior Vice President of Operations
gharden@careersourcerc.com 866-482-4473, ext. 427

PURPOSE

To provide guidance to Workforce Innovation and Opportunity Act (WIOA) Youth Staff on obtaining, recording, updating and verifying Literacy Numeracy gains for WIOA participants.

REFERENCES

Section 129 of the Workforce Innovation and Opportunity Act.

BACKGROUND

Section 129 HR 803-81 and 803-84 of the WIOA regulations specify that basic skills, to include literacy and numeracy, must be established for each participant at the time of enrollment or for a period not longer than six (6) months prior to enrollment. Section A (24) 3 (aa) permits WIOA program enrollment for individuals who lack any other WIOA-defined barriers and are basic skills deficient at the time of enrollment or up to six (6) months prior to enrollment.

POLICY

In local workforce development area 20 (LWDA20), a Test of Adult Basic Skills, or TABE as it is commonly known, will be administered at the time of enrollment or up to six (6) months prior to enrollment for each WIOA Youth participant. Paper tests or web-based tests are acceptable .All youth will complete a locator test to determine the appropriate level they will be tested at. ~~All youth will test at no lower than a "D" level.~~ Additionally, TABE test results from licensed testing sites (colleges, adult education programs, etc.) may be accepted as long as the test date is no more than six (6) months prior to the WIOA Youth enrollment date.

Participants are considered "basic skills deficient" if their TABE test results are at a National Rating Scale ~~n Educational Functional Level~~ (NRS~~EFL~~) of four (4) ~~6~~ or below. Participants are considered "basic skills sufficient" when their TABE test results are at a NRS ~~n EFL~~ of five (5) ~~7~~ or above.

Valid TABE test results may be used to qualify an individual for WIOA Youth enrollment as a barrier if that individual is the recipient of a high school diploma or its equivalent, is low-income and is basic skills deficient as evidenced by TABE test results.

Post TABE tests must be administered to all youth who enter the WIOA Youth program as basic skills deficient in either literacy or numeracy. Post tests may only be given in the area of deficiency and must be conducted at or above the level of the original TABE. ~~or at a minimum of a level "D", whichever is higher~~. It is required that all WIOA Youth participants who are basic skills deficient at the time of enrollment complete a post-TABE assessment on or before the one (1) year anniversary date of their original TABE used for enrollment. Post TABE assessments completed after the one (1) year anniversary date of the original TABE are in direct violation of this policy. WIOA enrolled youth must continue to take a post TABE test every year on or before the anniversary date of their original TABE until sufficiency is reached in both literacy and numeracy scores for as long as the WIOA youth file remains active.

Refer to **WIOA Youth – Literacy and Numeracy Procedure – November 2018**

~~PROCEDURE~~

~~I. Enrollment TABE/Literacy Numeracy Benchmark~~

~~All potential WIOA Youth enrollments must be TABE tested prior to enrollment into the WIOA Youth program. The following guidelines should be used for the initial TABE test:~~

1.) TABE tests can be administered by someone other than WIOA Youth Program staff, providing they are a certified TABE proctor or a local education institution.
2.) TABE tests cannot be dated more than six (6) months prior to the enrollment date.
3.) Enrollment TABE tests must include both reading and math, language is optional.
4.) TABE scores must be entered into Employ Florida at the time of enrollment.
5.) If a youth participant is basic skills deficient based on TABE scores, a Basic Skills activity code (414) must be opened in Employ Florida for the youth participant at time of enrollment.

II. Post TABE Test Requirements

1.) All youth participants must have a post TABE entered into Employ Florida on or before the anniversary date of each year from the date of the original TABE test.
2.) All youth participants that have not attained sufficiency in at least one area at the time of exit are required to submit to a post TABE test at the time of exit. If sufficiency is not attained at time of exit, an additional TABE must be conducted within 90 days of exit.
3.) Basic Skills activity code (414) is to remain open until sufficiency has been attained or until the youth participant exits the program, whichever occurs first.

III. TABE Documentation Requirements

1.) All TABE information must be entered into the Literacy and Numeracy section of the program screen in the Employ Florida system.
2.) If a TABE test was dated prior to the enrollment date, the anniversary date to be used is that of the original test date and not the WIOA Youth program enrollment date.
3.) EFL will be used to determine basic skills levels and increases.
4.) Dates on TABE tests must match dates entered into Employ Florida.
5.) Original TABE test must be uploaded into Isynergy at time of enrollment and within 5 days of any subsequent TABE tests administered.
6.) All files closed without post TABE requirements will result in an immediate internal file review and additional training for the assigned staff.

CareerSource RESEARCH COAST

AGENDA ITEM #6

AGENDA ITEM SUMMARY

TITLE:	WIOA Youth Measurable Skills Gains Policy
STRATEGIC GOALS	Operational Intelligence
POLICY/PLAN/LAW:	Workforce Innovation & Opportunity Act (WIOA) Youth Regulations
ACTION REQUESTED:	Review and Approve
BACKGROUND:	The Workforce Innovation and Opportunity Act (WIOA regulations specify that measureable skills gains attainment must be documented for WIOA-enrolled youth, to include training milestones, skills progressions, attainment of a secondary school diploma or its equivalent, and/or educational functioning level gains. A minimum of one measurable skills gain from any category must be attained for each participant within 12 months of enrollment in a WIOA Youth program, and during every year of enrollment until the WIOA Youth case is closed. LWDA 20 developed a local policy to provide clear guidance regarding WIOA Youth Measurable Skills Gains requirements. The categories of measurable skills gains to be utilized in LWDA20 are defined in the policy.
STAFF RECOMMENDATION:	Approve the WIOA Youth Measurable Skills Gains Policy
SUPPORTING MATERIALS:	WIOA Youth Measurable Skills Gains Draft
BOARD STAFF:	Glenda Harden, Senior Vice President of Operations gharden@careersourcerc.com 866-482-4473, ext. 427

CareerSource RESEARCH COAST

WORKFORCE INNOVATION AND OPPORTUNITY ACT- YOUTH MEASURABLE SKILLS GAINS POLICY
ORIGINAL APPROVAL DATE: 00/00/0000
BOARD EFFECTIVE DATE: 00/00/0000

PURPOSE
To provide guidance to the Workforce Innovation and Opportunity Act (WIOA) Youth Program on obtaining, recording, updating and verifying measureable skills gains for WIOA youth participants.

REFERENCES
Section 129 of the Workforce Innovation and Opportunity Act.

BACKGROUND
Section 129 HR 803-82 and 803-83 of the WIOA regulations specify that measureable skills gains attainment must be documented for WIOA-enrolled youth, to include training milestones, skills progressions, attainment of a secondary school diploma or its equivalent, and/or educational functioning level gains. A minimum of one measurable skills gain from any category must be attained for each participant within 12 months of enrollment in a WIOA Youth program, and during every year of enrollment until the WIOA Youth case is closed.

POLICY
For CareerSource Research Coast (CSRC) as the Local Workforce Development Board (LWDB) for Martin, St. Lucie and Indian River Counties, the categories of measureable skills gains are defined as follows:

- Training Milestone- the attainment of skills during an on-the-job training activity (not to include job shadowing or work experience/internship activities) as documented by evaluations completed by the employer or training provider during the on-the-job training period.
- Skills Progression- the attainment of skills as documented by the passing of an employer-required knowledge-based exam or documentation of satisfactory attainment of an element on an industry or occupational competency exam or test required to obtain a credential.
- Attainment of a Secondary School Diploma or its Equivalent- documentation that the participant attained a high school diploma/state-recognized equivalent documenting completion of secondary studies or alternative diploma, or documentation that the participant obtained passing scores on all 4 sections of the GED test.
- Educational Functioning Level- documentation of the results of a pre and post TABE exam, or other literacy and numeracy test approved by the National Reporting System that shows an increase of at least one functional level in reading and/or math.

Measureable skills gains must be attained by all participants of the WIOA Youth program. It is required that all WIOA Youth participants attain one or more measureable skills gains in at least one category on or before the one year anniversary date of their enrollment. WIOA enrolled youth must continue to attain at least one measureable skills gain in any category every year on or before the anniversary date of their enrollment for as long as the WIOA youth file remains active.

Refer to **WIOA Youth – Measurable Skills Gains Procedure – November 2018**

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CareerSource RESEARCH COAST

AGENDA ITEM #7

AGENDA ITEM SUMMARY

TITLE: Amendments and Updates to WIOA Policies

STRATEGIC GOALS: Optimal Use of Resources

POLICY/PLAN/LAW: Workforce Innovation and Opportunity Act (WIOA)/Board Policy

ACTION REQUESTED: Review and Approve the Amendments and Updates to the Board's WIOA Policies

BACKGROUND:

WIOA is federal law that authorizes funding for state and local workforce initiatives for eligible adults and youth. Flexibility is allowed under several of the requirements of the law in order for states and local workforce development boards to carry out the programs and services provided by the funding.

CareerSource Research Coast (CSRC) staff, follows the guidance of CareerSource Florida (the State's Workforce Board) and the Department of Economic Opportunity (the State's Oversight Agency), and makes recommendations to the CSRC Board of Directors to allow for this flexibility in order to meet the needs of our Local Workforce Development Area (LWDA). LWDAs must document their approved flexibility of the WIOA requirements through local policy.

As State and local initiatives under the law change or emerge, policies at the state and local levels need to be updated.

Many of the local CSRC WIOA policies include the local operating procedures that program staff must follow in order to carry out the policies. Often, through lessons learned, best practices, etc., the steps or operating procedures established to carry out the policies are changed. Any changes made to policies must be brought before the Programs & Services Committee, the Executive Committee and the full Board of Directors for approval. In order to expedite best practices, or to add procedures for a new initiative, CSRC staff is recommending that the local operating procedures be separated from the Board Policy it applies to. It is understood that all policies must be carried out as approved.

With continued guidance on the implementation of WIOA, language/terms have also been updated.

STAFF RECOMMENDATION: Approve the Amended and Updated WIOA Policies.

SUPPORTING MATERIALS: WIOA Policies with amendments, updates and deletions.

BOARD STAFF: Glenda Harden, Senior Vice President of Operations
gharden@careersourcerc.com 866-482-4473, ext. 427

PURPOSE

~~Local Boards are required to revise their policies for the selection and retention of Eligible Training Providers (ETPs) and their programs to be consistent with the Workforce Innovation and Opportunity Act (WIOA) legislation.~~ This policy provides guidance for the initial and subsequent determination of training ~~of training~~ providers, federal and state requirements under Workforce Innovation and Opportunity Act (WIOA) legislation,~~WIOA~~ , ~~-~~performance requirements and the removal provisions for training providers.~~training providers.~~ Pursuant to WIOA, a Local Board, through local policy, may establish additional criteria and required information for training program eligibility within its Local Workforce Development Area (LWDA). This policy also establishes the criteria for Training Provider Eligibility for CareerSource Research Coast (CSRC), ~~Local Workforce Development Area (~~LWDA~~)~~ 20.

BACKGROUND

Under WIOA, the Governor, through CareerSource Florida, has developed Administrative policy establishing criteria, information requirements and procedures regarding the eligibility of providers of training services to receive funds provided under section 133(b), WIOA, for the provision of training services/programs of study in local areas in the State. This policy describes the process for determining eligible training providers for WIOA Title I-B adult and dislocated worker and out-of-school training participants, for continued eligibility of those providers, their programs of study and for publicly disseminating the list of these providers with relevant information about their programs of study. WIOA emphasizes informed customer choice, job-driven training, provider performance and continuous improvement.

AUTHORITY:

WIOA Sections 122, 133 WIOA Regulations, 20 CFR 680.400 et seq., Subpart D – Eligible Training Providers Florida Statutes, Chapter 445 – Workforce Innovation FS Chapter 1005 Florida Statutes, Chapter 1008 – Florida Education and Training Placement Information Program Nonpublic Postsecondary Education FAC6E – Commission for Independent Education FS Chapter 1008, Training and Employment Guidance Letter (TEGL) No.3-18, TEGL No. 41-14

POLICY:

A. Eligible Training Providers (ETPs) Requirements

ETPs are entities eligible to receive WIOA funds for adult and dislocated worker participants, and out-of-school youth ages 18-24 who enroll in training services through Individual Training Accounts (ITAs). ETPs ~~ligible training providers~~ shall be:

1. Institutions of higher education providing training programs leading to a recognized postsecondary credential, or:
2. Registered Apprenticeship[1] Programs, or;
3. Other public/private providers such as joint labor-management organizations, pre-apprenticeship programs and occupational/technical training, or;
4. Adult education and literacy activities when such training is combined with occupational skills training

With the exception of Registered Apprenticeship programs, all other training programs must be for training for occupations on the CSRC Local Targeted ~~Demand~~ Occupations List (LTOL), current at the time of training.

B. Establishing Eligibility

Of those ETPs listed above, training providers fall into three categories: 1) those continuing ~~already~~ eligibility~~le~~ under WIOA~~the Workforce Investment Act (WIA)~~; 2) those that are exempt, and; 3) non-exempt providers not previously eligible under WIOA~~WIA~~.

[1] ~~Registered apprenticeship programs are exempt from TOL compliance and from the application process for the ETPL~~

1. Existing WIOA~~WIA~~ training providers must submit an application for **"continued eligibility"**. If approved, the provider will be eligible for two (2) years. Providers must re-apply for "continued eligibility" three months before eligibility expires. Applicants must provide verification of license to provide training services programs in Florida and all other program required information as specified in the Continued Eligibility application.
2. Training Providers that carry out apprenticeship programs registered under the National Apprenticeship Act are exempt from Initial and Continued Eligibility application procedures. Registered Apprenticeship programs are to be included and maintained on the local Eligible Training Provider List (ETPL) as long as the corresponding program remains registered and will remain on the ETPL until it is deregistered or until the registered apprenticeship notifies the Department of Economic Opportunity in writing that it no longer wants to be included on the ETPL.
3. Other providers of training services may apply for **"initial eligibility".** Training providers must complete a CSRC application for the initial inclusion of the training provider and programs of study on the local list of eligible training providers (ETPL). The training provider must specifically identify the program(s) of study it intends to provide. If approved, the provider will be on the ETPL for one (1) full year, and must perform successfully to be considered for "continued eligibility". See section "E" for local minimum performance levels~~requirements~~.

   The policy and applications for initial and continued eligibility will be available on CSRC's website (www.careersourcerc.com). Incomplete applications will not be considered. Questions regarding the completion of the applications must be submitted to ccoble@careersourcerc.com.

C. CSRC~~The Board~~ has an established application, review and approval process for potential training providers. Applications from potential training providers are accepted throughout the year. The process is as follows:

1. The application has a Responsiveness Checklist for Application for Training Provider Approval to outline the qualifications the provider must meet for approval. This checklist also includes a question specific to whether or not the training provider agrees to participate in Florida Education Training Placement Information Program (FETPIP) or is participating in FETPIP.

2. When the application is received, it is date stamped and two staff members review the application with the checklist to see if all areas have been addressed (within 10 business days). If the review team agrees that the application is responsive and the provider has addressed all areas on the checklist, the application moves to the next step. If the review team determines that the provider has not addressed all areas on the checklist, the missing areas are described and a denial letter is sent to the provider (within three weeks of the clock in date of the application) outlining the deficiencies. The provider has the opportunity to re-submit the application in the future.

3. If the review team determines the provider has addressed all areas in the checklist, a rating team (Board and staff members) is established to review the provider's application utilizing the LWDA Rating Sheet for Application for Training Provider Approval. The rating sheet has one hundred (100) points available and each member of the team completes the form.

4. Once the team has completed the rating sheets for the training provider, the forms are assembled and the scoring is calculated. The average rating score must be at least seventy-five (75) points in order to be considered for addition to the CSRC ETPL. If the training provider meets this threshold, the rating team makes a recommendation to present to the Programs & Services (P&S)Committee.

   a) If the training provider application does not meet the required rating score, the training provider is notified in writing as to the reasons. If the training provider applicant contends the review was flawed, they may protest the decision to the Senior Vice President of Operations. The Senior Vice President of Operations will attempt to resolve all such disputes in a reasonable manner. If the dispute cannot be resolved, the protesting applicant can appeal to the President/CEO. If the matter remains unresolved, an appeal to the Executive

Committee of CSRC can be made and finally the applicant may file a grievance pursuant to Chapter 120, Florida's Administrative Procedures Act, and the state's grievance policy WDP 99-104.

5. After initial approval, an ETP applicant is placed on the agenda for the next P&S~~Programs and Services~~ Committee meeting for review. The committee reviews the rating team's recommendations and votes to approve or deny the training provider application. The P&S~~Programs & Services~~ Committee forwards their recommendation to the Executive Committee who takes their recommendation to the full Board under a Consent Agenda.

D. CSRC has developed an Occupational Skills Training Provider Agreement for eligible, approved providers. The agreement requires that all training providers submit performance information on an ~~semester/term~~ annual basis as well as cost information on an annual basis or as costs change.

E. CSRC has included minimum performance levels in the Occupational Skills Training Provider Agreement and those levels must be maintained in order to remain on the local ETPL. These levels are as follows:
   a) % of WIOA participants who completed the program of study - 75%
   b) % of WIOA participants who completed the program of study and obtained employment - 85%
   c) % of WIOA participants who complete the program of study~~training~~, obtain unsubsidized employment and who are retained fourth quarter after exit – 85~~90~~%
   d) % of WIOA participants who complete the program of study ~~training~~ and obtain an industry recognized credential or a degree – 75~~90~~%

F. Approved ETPs~~training providers~~ and their ~~training provider~~ programs of study will be placed on the CSRC ETPL and posted on the website at www.careersourcerc.com. The ETPL will be accompanied by performance and cost information and presented in a method to maximize informed customer choice and serve all significant populations.

G. The State's ETPL will also be listed on CSRC's website. ~~as well as training providers and training provider programs approved elsewhere in the state~~ If there is an insufficient number of ETPs in LWDA 20 offering programs of study for occupations listed on the LTOL, CSRC may grandfather approval to ETPs and their programs of study approved elsewhere in the State when the ~~training programs are for occupations listed on the local Demand Occupations List and the~~ performance of the ETP and the program of study~~training provider~~ meets the criteria set by CSRC as detailed in part "E" of this policy.

H. Complaints from participants regarding the performance of a training provider and/or their program of study are addressed initially by administrative staff. Staff contacts the training providers, via a telephone or on-site visit, to verify facts. Staff may request a corrective action plan, if the complaint is validated. If staff is unable to resolve the complaint with the training provider and the participant, the complaint is elevated to the P&S ~~Programs and Services~~ Committee for resolution.

I. At any time during the year, administrative staff can make recommendations to the P&S ~~Programs and Services~~ Committee to cease training for occupations that have resulted in over-training and/or when there is a decline in job openings. Administrative staff, after review of ETP's programs of study performance data, can make recommendations to the P&S Committee to remove the program of study from the ETPL. The actions of the Committee are regularly reviewed and approved by the full Board.

CareerSource RESEARCH COAST

WORKFORCE INNOVATION AND OPPORTUNITY ACT POLICY #3
LOCAL~~REGIONAL~~ TARGETED OCCUPATIONS LIST POLICY
ORIGINAL APPROVAL DATE: 2/12/2014
REVISION DATE: 11/07/2018
BOARD EFFECTIVE DATE: ~~3/26/2014~~

PURPOSE

~~The CareerSource Florida (formerly known as CareerSource Florida Inc.) Board of Directors established a new Regional Targeted Occupations List (TOL) Policy at their November 2013 meeting.~~ The purpose of this policy is to establish~~ed~~ the requirements and process for CareerSource Research Coast (CSRC), as the Local Workforce Development Board (LWDB), ~~a new process for Regional Workforce Boards (RWBs)~~ to identify, maintain and update local targeted occupations for providing occupational skills training through a Local Targeted Occupations List (LTOL). ~~. The objective of this improved process is to build regional industry clusters and a skilled regional workforce.~~

The LTOL process establishes ~~purpose of this policy is to incorporate this new process and establish~~ CareerSource Research Coast's strategies to enhance collaboration with Local Workforce Development Area (LWDA) 20 stakeholders to result in a skilled workforce responsive to local industry talent needs.~~to build a skilled workforce around Region 20's targeted occupational and industry areas.~~

REFERENCES

WIOA Public Law 113-128 Sections 3(23)(B) and 134 (c)(3) (G) (iii), Florida Statutes, Section 1003.492 (2)(b); and Section 445.004 (6)~~, section 134(c)(3); 20CFR 663.310(c); Florida Statutes sections 216.136(7)(2), 445.004(6)(e), 1008.43; Action Item 1 CareerSource Florida BOD 11-07-2013 Agenda Packet; DEO Consultation Paper "Regional Targeted Occupations List Process"~~, CareerSource Florida Administrative Policy #82

BACKGROUND

The Florida Department of Economic Opportunity (DEO), Bureau of Labor Market Statistics publishes, on an annual basis, Florida's statewide targeted occupations list and 24 local area targeted occupations lists of high growth/high wage occupations. The LWDBs utilize the lists, along with other resources, to develop their own LTOLs.~~The Florida Workforce Estimating Conference meets semi-annually where decisions are made on criteria that will be used to define high skill/high wage occupations, as well as establish and approve a statewide Demand Occupations List. This statewide list identifies the labor market needs of Florida's business community and encourages job training based on those needs, and is used as a baseline for establishing regional targeted occupations lists.~~

CareerSource Florida updated the State of Florida's Administrative Policy for Local Targeted Occupations List Requirements on June 18, 2018. Through this policy and process, LWDBs have the ability to identify and select occupations relevant to the Local Workforce Development Areas (LWDAs). With occupations identified and placed on the LTOL for their area, LWDAs can direct training resources for occupations in demand to assist job seekers, as well as local area workers seeking better employment and higher-earning opportunities.

~~A research study issued by CareerSource Florida found that the TOL process had a one-year lag time to implementation, meaning that occupational targeting projections were based on projections one-year old. Also, business input into the TOL was lacking in many instances and the Florida business organizations and industry associations did not understand or recognize the process. Other survey work revealed the process caused confusion for RWB's and partners who wanted to modify the regional TOLs. Other practices related to the TOL promoted unnecessary inflexibility that negatively impacted workers and employers.~~

Additional requirements of the State's updated Local Targeted Occupations List Policy are as follows:

- Local policies must provide priority for training that is linked to job openings for businesses in Florida's targeted and infrastructure industries and local economic priorities
- All training is limited to two years in duration and must lead to the attainment of industry-recognized certificate or certifications, as associate's degree or a bachelor's degree. The two-year duration is not required to be consecutive.
- LWDBs must make available to the public, information regarding the process implemented in producing the LTOL. LWDBs shall publish their LTOLs on their websites and submit to DEO a link to their updated LTOLs by June 30th of each year.
- LWDs must update their LTOL when occupations are added or deleted, or when there is a change in demand for occupations.~~Under this new process, RWBs can add or delete occupations to their TOL without approval of DEO or CareerSource Florida. The revised policy limits training for up to two years and the attainment of industry-~~

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~~recognized certificates or certifications, as an associate's degree or a bachelor's degree. RWBs must revise their regional plans and policies to meet the requirements of this new TOL policy.~~

POLICY

CSRC~~CareerSource Research Coast~~ will utilize the statewide and Local~~regional~~ Targeted ~~Demand~~ Occupations Lists published by LMS as a starting point. These lists will be distributed ~~to~~to the CSRC ~~our~~ Business Services team, educational partners, ~~and regional~~ business and industry representatives in LWDA 20~~employers~~ for review to determine the need to add to or remove occupations from the LTOL. ~~if occupations that are declining should remain on the list as well as to identify occupations that will be experiencing an increase in training for proposed hiring needs be added.~~

CSRC~~CareerSource Research Coast~~ regularly analyzes the regional labor market, looking for industry and occupational trends. Input will be sought from our local economic development agencies, chambers of commerce, the regional planning council, industry organizations and other community partners~~s on a quarterly basis~~ regarding the need to add occupations to or remove occupations from the LTOL~~regional TOL~~. CSRC's ~~CareerSource Research Coast's~~ staff members participate on the advisory boards and committees of these entities where feedback regarding the LTOL will also be obtained.

CSRC~~CareerSource Research Coast~~ will utilize additional resources such as various databases and software tools to align targeted industries with open job orders within our regional system. ~~These resources include: Help Wanted Online, Supply/Demand lists, Economic Modeling Specialist Intl., CareerBuilder, Monster.com and Enterprise Florida.~~

Utilizing the Targeted Occupations List Survey form, data will be collected from educational partners and local~~regional~~ employers, documented information will also be obtained from business and industry meetings and information from the additional resources will collectively be analyzed and presented to the Programs and Services Committee of the CSRC Board ~~CareerSource Research Coast Board~~ of Directors on a quarterly basis. Occupations marked for deletion or addition will be submitted at these quarterly meetings for initial review and a recommendation made to the Executive Committee for approval or denial. Occupations being targeted must align with Florida's targeted and infrastructure industries, our local economic development priorities, have at least ten (10) documented annual job openings and support CSRC's~~CareerSource Research Coast's~~ employment and earnings goal as determined by the Primary Indicators of Performance negotiated each Program Year with the State. ~~(average six-month income rate of $17,200)~~. Occupations recommended to be deleted or added will not be included on the ~~Regional Targeted Occupations List~~ LTOL until approved by the full Board of Directors under a Consent Agenda.

~~For Q1 2014,~~ The following targeted occupations industries are included within the CSRC Four Year Plan:~~our strategic plan:~~

- ~~Aviation/Aerospace~~ Healthcare
- ~~Marine Industries~~ Construction Trades
- ~~Agribusiness~~ Logistics and Distribution
- Manufacturing
  - ~~Financial/Professional Services~~
  - ~~Professional and Business Services~~
  - ~~Life Sciences~~
  - ~~Education and Health Services~~
  - ~~Transportation~~

The level of training subsidy issued to participants under Individual Training Accounts will be categorized into two~~three~~ tiers based on ~~whether~~ the average entry wage levels of the occupational training positions.~~is for an entry level position, bridge position or high-wage position.~~ The tiers, average entry wage and maximum investment are defined in the table below:

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TIER	AVG WAGE	MAXIMUM ITA INVESTMENT
Tier 1~~Entry Wage~~	$13.00 to $15.00 per hour~~$9.93 - $11.99 per hour~~	*Up to $3,500*
Tier 2~~Median Wage(Bridge)~~	$15.01 + per hour ~~$12.00 - $14.50 per hour~~	*Up to $5,000~~6,500~~*
~~High Wage~~	~~$14.50+ per hour~~	~~*Up to $8,500*~~

Specific policy ~~and process~~ for the issuance of ITAs is addressed in a separate policy and has been approved by the CSRC Board of Directors. ~~is available for public view on the CareerSource Research Coast website~~.

Specific policy ~~A separate policy~~ ~~with the process~~ for maintaining and updating the CSRC~~CareerSource Research Coast~~ Eligible Training Provider List (ETPL) is addressed in a separate policy and ~~list~~ has been ~~developed and will be followed as~~ approved by the CSRC Board of Directors. The ETPL is available for public view on the CSRC website.

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CareerSource RESEARCH COAST

WORKFORCE INNOVATION AND OPPORTUNITY ACT POLICY #4
INTERNSHIP POLICY
ORIGINAL APPROVAL DATE: 4/3/2009
REVISION DATE: 11/07/2018
BOARD EFFECTIVE DATE: ~~8/28/2013~~

PURPOSE
To clarify the use and length of internship activities funded through the Workforce Innovation and Opportunity Act (WIOA).

REFERENCES:
~~Workforce I~~nnovation and Opportunity Act WIOA 2014 Rules and Regulations, Section 134 (b) (2) (A) (vii); Training and Employment Guidance Letter (TEGL) No. 3-15 (2) "Individualized Career Services".

~~REGIONAL/LOCAL POLICY ACTION~~ BACKGROUND:
~~Regionally,~~ CareerSource Research Coast (CSRC) terms work experience ~~opportunities~~ as "Internships". An i~~I~~nternship is a planned, structured learning experience that takes place in a workplace for a limited period of time. Internships may be paid or unpaid, as appropriate and consistent with other laws, such as the Fair Labor Standards Act. An internship may be arranged within the private for profit sector, the non-profit sector, or the public sector.

POLICY:
~~service to assist in the assessment of an individual for further training or placement allowed under the WIOA. This service is designed~~ CSRC will authorize internships to meet the needs of individuals who have:

- Limited or no work experience in targeted sector industries and occupations in demand for Local Workforce Development Area (LWDA) 20 – or –
- Outdated skills – or –
- No work experience related to their recent educational career field

and are ~~is~~ in need of this learning experience ~~service~~ to obtain unsubsidized employment leading to self-sufficiency. These internships are established as short-term, subsidized employment learning experiences in targeted, sector industries with occupations in demand in LWDA 20 with private, non-profit or public employers. Internships are ~~is~~ not to exceed 320 hours or sixteen (16) ~~twelve (12)~~ weeks, whichever occurs first, at no more than 40 hours per week. ~~(480 hours).~~ All Internships will pay t~~T~~he participants ~~will be paid~~ at the prevailing entry level wage for occupations in demand in LWDA 20 established annually, and require the following: ~~as $12 to $22 per hour.~~

* A ~~The~~ Training Outline ~~will be developed~~ based on the participants' needs to develop habits, attitudes and skills essential to the workplace, as well as the needs of the worksite employer; ~~.~~

* A work schedule that is ~~The times and days worked may vary by worksite and are negotiated with the worksite employer~~ based upon the employers' operating hours of business;

* A Worksite~~s~~ Evaluation ~~will be evaluated~~ prior to placing a participant at the site, and the employer's ~~must~~ documentation of their compliance with applicable federal and state wage and employment laws; ~~Note: Labor standards apply where an employer/employee relationship exists.~~

* A ~~Every internship will be documented with a~~ worksite agreement signed by the employer, an appropriate CSRC~~CareerSource Research Coast~~ representative, as designated by the Senior Vice President of Operations or CEO, and when ~~an~~ appropriate, the E~~e~~mployer of R~~r~~ecord (EOR) signature. The worksite agreement must be completed~~. The worksite agreement must be completed~~ prior to a participant being placed at the worksite;

* A process through which w~~W~~ages for internship participants will be ~~will be~~paid ~~bi-weekly (every other week)~~ by ~~CareerSource Research Coast~~CSRC or its contracted ~~Employer of Record (~~EOR~~)~~ based on timesheets completed, signed by the participant and employer, and submitted to CSRC and ~~(if applicable)~~ its contracted EOR, if applicable~~. It is the responsibility of the Career Planner; and prior to submission to the finance department.~~

* Workers Compensation benefits~~will be~~ covered by a ~~the~~State of Florida insurance~~. The~~ provider. ~~is AmeriSys and the provider may be contacted using the following toll free number 1-800-455-2079, in case of a work-related injury. The manager or supervisor will be prompted to provide a 4-digit code to identify the program area of the injured employee. The location code for WIOA-funded internships is 2306.~~

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~~PROCEDURE:~~

~~Business Services Account Managers, will recruit appropriate worksite employers, develop and negotiate worksite agreements appropriate for participants. Emphasis will be made on matching work site opportunities with the training, interests and aptitudes of participants for targeted industries with occupations in demand. Account Managers will complete the Pre-Award, Worksite Agreement and include a generalized Training Plan that outlines the skills needed to learn the job. Once these forms are completed, they will be scanned into the iSynergy electronic filing system.~~

~~All potential candidates will be screened for WIOA eligibility and suitability. If it is determined that the candidate is appropriate for an internship, documentation will be collected and a WIOA application will be completed in Employ Florida Marketplace (EFM). Once the application and assessment for suitability are completed, the Career Planner will notify the assigned Account Manager of the candidate's status for referral to potential internship sites. The Account Manager will be responsible for job matching and scheduling/communicating with the employer and candidate. The Career Planner will document the need for an internship in the participant's Individual Employment Plan (IEP); the objective must be "Internship". The Career Planner will document in the case file why an internship is recommended, how it will benefit the participant. The final IEP and Training Plan will be reviewed with the participant and any additional WIOA forms will be completed. Career Planners will compile all required documentation and forward to the WIOA Quality Assurance Specialist/Trainer for review. The WIOA Quality Assurance Specialist/Trainer will review and request any corrections to be made and forward to the WIOA Program Manager for final approval. The WIOA Career Planners are responsible for ongoing tracking of the hours worked and follow-up with the worksite employers for any noted issues/concerns on the timesheets. The WIOA Quality Assurance Specialist/Trainer will also track internship expenditures for each participant.~~

~~Career Planners will collect the participant's time sheets in a timely manner and submit to the WIOA Quality Assurance Specialist/Trainer for review. The WIOA Quality Assurance Specialist/Trainer will review and request any additions/changes to be made and after approval, submit to the finance department for payment. Internship participants are paid by CareerSource Research Coast using WIOA funds.~~

~~Paychecks for internship will be mailed to the internship participants at their address on file. Any concerns noted regarding an employer timesheet submission, phone calls, or worksite visits must be brought to the attention of the Account Manager and subsequently submitted to the Director of Business Services for resolution.~~

~~The WIOA Quality Assurance Specialist/Trainer will be responsible for completing the Worksite Monitoring Tool for each internship employer. These monitoring tools are to be maintained and accessible for state/federal/local reviews.~~

~~The WIOA Quality Assurance Specialist/Trainer and the assigned Account Manager will be copied on all emails related to internships from initial placement to final completion of internship paperwork, to assure that compliance in all areas is maintained.~~

~~Related Forms:~~

- ~~Employer Pre-Award~~
- ~~Worksite Agreement~~
- ~~Internship Job Description~~
- ~~Internship Training Outline~~
- ~~Internship Checklist~~
- ~~Finance- Required Documentation Check-off Sheet~~
- ~~Internship Timesheet~~
- ~~Worksite/Internship Monitoring Tool~~
- ~~W-4~~
- ~~I-9~~

REFERENCE DOCUMENT(S)

LOCAL OPERATING PROCEDURE FOR POLICY #4

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CareerSource RESEARCH COAST

WORKFORCE INNOVATION AND OPPORTUNITY ACT
INTERNSHIP POLICY
ORIGINAL APPROVAL DATE: 4/3/2009
REVISION DATE: 11/07/2018
BOARD EFFECTIVE DATE: 8/28/2013

PURPOSE
To clarify the use and length of internship activities funded through the Workforce Innovation and Opportunity Act (WIOA).

REFERENCES:
WIOA 2014 Rules and Regulations, Section 134 (b) (2) (A) (vii);Training and Employment Guidance Letter (TEGL) No. 3-15 (2) "Individualized Career Services".

BACKGROUND:
CareerSource Research Coast (CSRC) terms work experience as "Internships". An internship is a planned, structured learning experience that takes place in a workplace for a limited period of time. Internships may be paid or unpaid, as appropriate and consistent with other laws, such as the Fair Labor Standards Act. An internship may be arranged within the private for profit sector, the non-profit sector, or the public sector.

POLICY:
CSRC will authorize internships to meet the needs of individuals who have:

- Limited or no work experience in targeted sector industries and occupations in demand for Local Workforce Development Area (LWDA) 20 – or –
- Outdated skills – or –
- No work experience related to their recent educational career field

and are ~~-~~in need of this learning experience to obtain unsubsidized employment leading to self-sufficiency. The CSRC paid~~se~~ internships are established as short-term, subsidized employment learning experiences in targeted, sector industries with occupations in demand in LWDA 20 with private, non-profit or public employers. Internships are not to exceed 320 hours or sixteen (16) weeks, whichever occurs first, at no more than 40 hours per week. All paid Internships will pay the participants at the prevailing entry level wage for occupations in demand in LWDA 20 established annually. All internships will ~~, and~~ require the following:

- A Training Outline based on the participants' needs to develop habits, attitudes and skills essential to the workplace, as well as the needs of the worksite employer;
- A work schedule that is based upon the employers' operating hours of business;
- A Worksite Evaluation prior to placing a participant at the site, and the employer's documentation of their compliance with applicable federal and state wage and employment laws;
- A worksite agreement signed by the employer, an appropriate CSRC representative, as designated by the Senior Vice President of Operations or CEO, and when appropriate, the Employer of Record (EOR) signature. The worksite agreement must be completed prior to a participant being placed at the worksite;
- *For paid internships:* A process through which wages for internship participants will be paid by CSRC or its contracted EOR based on timesheets completed, signed by the participant and employer, and submitted to CSRC and its contracted EOR, if applicable;
- Workers Compensation benefits covered by a State of Florida insurance provider.

Refer to **WIOA – Internship Procedure – November 2018**

PURPOSE

The purpose of this EWT Training Policy is to provide guidance to CareerSource Research Coast (CSRC) staff regarding serving Employed Workers. Employed Workers may be eligible for services under the Workforce Innovation and Opportunity Act (WIOA) ~~WIOA~~ or through an employer initiated training agreement. This policy will provide uniformity and consistency in the delivery of this service.

REFERENCES

WIOA, ~~Workforce Innovation and Opportunity Act,~~ Title I, Pub. L. No 113-128, §§134(d)(4), U.S. Department of Labor, Training and Employment Guidance Letter (TEGL) No~~O~~. 3-15.

BACKGROUND ~~POLICY~~

An Employed Worker is a working individual in need of retraining or upgrade of existing skills to obtain or retain a job that allows for self-sufficiency. Self-Sufficiency is the ability of individuals and families to earn a wage that permits them to consistently meet their needs with minimal or no financial assistance or subsidies.

POLICY

CSRC identifies and provides services to~~There are~~ three (3) types of Employed Workers:

1. An employed adult who seeks WIOA funded training through CRSC of their own accord;
2. A Dislocated Worker who has become re-employed in an "income maintenance" job and needs the training to increase their earnings potential and seeks WIOA funded training through CRSC of their own accord; and
3. An employed adult ~~incumbent worker~~ whose employer requests training on their behalf in order to avert potential layoffs of employees, or to increase the skill levels of employees so they can ~~-~~be promoted within the company and create backfill opportunities for the employer.

CSRC follows~~Each of these types of Employed Workers has~~ separate procedures that define the services they are eligible for.

1. An employed adult who seeks WIOA funded training on their own.~~Career seeker who is employed at participation (Employed Individual seeking assistance on their own)~~

   CRITERIA:

   Basic eligibility, need and suitability will be established. The income calculation will be completed based upon the previous 6 months of household income. If the hourly rate amount exceeds locally defined self-sufficiency rate, the career seeker is not eligible for enrollment

2. Dislocated Worker (DW) career seeker in an "Income Maintenance" job.

   CRITERIA:

   An "Income Maintenance" job is employment that a DW career seeker has accepted to maintain their family's status quo. The DW career seeker may be enrolled in training if the wage from their income maintenance job is lower than the wage earned at their previous job and lower than the locally defined self-sufficiency wage. Wage comparison is done based upon the DW career seeker's previous and current rates of pay, not household income. In addition, there must be a demonstrated need for training to obtain new employment in a targeted occupation. ~~"Income Maintenance" employment is defined as employment that an employee has accepted to try to maintain their family's status quo and is **lower than their previous rate of pay and lower than the locally defined self- sufficiency rate**. In addition, there must be a demonstrated need for training to obtain new employment in a targeted occupation. Income calculation will be completed based upon the prior 6-months income. In order to qualify an employee utilizing this criteria, documentation of previous salary must be collected and compared to present wage. If current wage is at lower than wage previously earned and lower than the locally defined self-sufficiency wage, the employee may be enrolled in training. Wage comparison is done based upon Dislocated Workers previous and current rates of pay, not household income.~~

~~3.~~ An employed adult whose employer identifies and requests training under an Employed Worker Training (EWT) A~~a~~greement ~~with employer (Individual is identified by employer)~~

CRITERIA:

EWT~~mployed Worker training~~ provides both workers and employers with the opportunity to build and maintain a quality workforce. ~~Incumbent Worker~~ EWT ~~training~~ can be used to help avert potential layoffs of employees, or to increase the skill levels of employees so they can be promoted within the company and create backfill opportunities for the employers.

EWT ~~Employed worker training~~ needs to take into account the following factors:

- The characteristics of the participants in the program;
- The relationship of the training to the competitiveness of a participant and the employer, and;
- Other factors the State or local boards may determine appropriate (e.g., the number of employees participating in the training, wage and benefit levels of those employees (both pre- and post-participation earnings, and the existence of other training and advancement opportunities provided by the employer).

In an EWT ~~Employed Worker~~ Agreement, employers are required to pay for a significant cost of the training for those employees participating in training; this can be done through both cash and/or in-kind payments. The wages paid to participants, while in training, may be considered as a source of matching funds.

In LWDA 20, the amount of employer share in the EWT ~~Employed Worker Training depends~~ shall not be less than~~on the size of the employer, WIOA section 134(d)(4)(D)~~:

- 10 percent of the cost, for employers with not more than 50 employees;
- 25 percent of the cost, for employers with more than 50 employees but not more than 100 employees; and
- 50 percent of the cost, for employers with more than 100 employees.

Examples of employer contribution include, but are not limited to expenses associated with: Instruction/Tuition; curriculum development; materials/supplies; the use of space and equipment during the training project (calculation used to assign a value must be documented); and trainee wages (including benefits) of employees during training.

Individuals served under this category must not exceed the locally defined self-sufficiency hourly rate.

1. Preference is given to Businesses in one of the key Industry Cluster:
    - Health Care
    - Manufacturing
    - Logistics and Distribution
    - Construction Trades

~~EWT CASE MANAGEMENT/REIMBURSEMENT PROCESS~~

~~In order to qualify, an employer must comply with all rules and regulations listed in the Employed Worker guidelines and agreement~~

1. ~~EWT agreements must be written based on the specific needs of the employer. The agreement must address the job skills to be taught by the training provider and accomplished by the employee upon completion.~~
2. ~~The suitability of the employer's worksite will be assessed by the Business Services Account Manager as part of the agreement development and will be conducted prior to the final completion of the agreement and placement of the employee in the training. (EWT Pre-Award Review)~~
3. ~~EWT services will not be developed with an employer who will be relocating.~~
4. ~~All EWT employees must be covered by Workers' Compensation from the onset of training provided by the employer.~~
5. ~~A completed EWT Pre-award Review, EWT Training Application, EWT agreement, Employed Worker Grant – Employee Registration and Training Outcomes Tracking Form, is to be submitted to the Vice President of~~

~~Operations and or designee for funding approval. The agreement will be reviewed for reasonable cost and related party. If a related party is involved, Board approval is required as outlined in the Board's Related Party Transaction Policy. Once funding approval is received, the Business Services Account Manager will then complete the EWT Guidelines & Agreement with the employer. At the time the EWT is approved, a copy of the EWT agreement including the W-9 must be submitted to CSRC's Finance Department in order to enter the employer and employee into the finance system (MIP).~~

6. ~~The EWT agreement must be completed in full and contain all necessary employer, employee and CSRC staff signatures prior to enrolling the employees into Employ Florida.~~
7. ~~All proposed employees must be verified as eligible for WIOA services **before** training can take place.~~
8. ~~Once all proposed employees are verified as WIOA eligible, they will be entered into Employ Florida and enrolled into a Customized Training Activity. EFM codes 102, 212, and 304, will be utilized, unless otherwise specified. An individual career plan in Employ Florida is not necessary for EWT participants.~~
9. ~~Upon completion of the training, the employer must provide proof of payments via a 100% paid invoice to CRSC Finance Department. The employer must also submit copies of all credentials to CRSC Finance Department along with an invoice requesting reimbursement for training.~~
10. ~~When the credential is received, the Career Planner will close the activity with an Occupational Skills Certificate and complete an Employment Verification Form in order to close the case with entered employment.~~
11. ~~The Career Planner will conduct employment verifications on the following schedules: 90, 180, 270 and 365 days following the completion of training. This can be conducted via an e-mail spreadsheet.~~

REFERENCE DOCUMENT(S)

LOCAL OPERATING PROCEDURE FOR POLICY #6

~~**ATTACHMENTS:** Documents found on Share Drive~~

- ~~EWT Pre-Award Review~~
- ~~EWT Guidelines & Agreement~~
- ~~EWT Attachment -Employed Worker Training Participant Application~~
- ~~EWT – Training Outcomes Tracking Form~~
- ~~W-9~~

PURPOSE

To describe the process for using Workforce Innovation and Opportunity Act (WIOA) funds to provide training services to trade-affected workers.

REFERENCES

The Trade Adjustment Act (TAA) Program was first established at the Department of Labor by the Trade Act of 1974, and has been amended several times. The TAARA 2015, title IV of the Trade Preferences Extension Act of 2015 (Public Law 114-27) was signed into law on June 29, 2015 and both amends and reauthorizes the TAA Program. The TAARA 2015 restores the worker group eligibility and benefits established by the Trade Adjustment Assistance Extension Act of 2011 (TAAEA) and also authorizes the operation of the 2015 Program and continuation of the 2002 Program, the 2009 Program, and the 2011 Program through June 30, 2021. Additionally, new requirements are added by the TAARA 2015 to align performance reporting for the TAA Program with the requirements of WIOA.

POLICY

In Region 20, the process for using WIOA funds to provide training services to trade-affected clients is to first verify that the client meets the TAA eligibility. Once eligibility is determined, the local TAA Coordinator completes the Supplemental Funding Request/Authority to Request Funding form, and forwards the completed form to the State TAA Coordinator for processing and approval.

If the State does not have Supplemental funding, the Career Centers will determine eligibility through the WIOA Adult or Dislocated Worker program.

~~**PROCEDURE**~~

~~Individual workers who are members of the certified worker group apply for benefits and services at a One-Stop Center(s) (branded as American Job Centers). Individual workers who meet the qualifying criteria may receive: job training; income support in the form of Trade Readjustment Allowances (TRA); job search and relocation allowances; Health Coverage Tax Credit (HCTC) (as determined by the Internal Revenue Service (IRS)); and for workers age 50 and older, a wage supplement in the form of RTAA. In addition, all workers covered by a certification are eligible for employment and case management services including Basic and Individualized Career Services either through the TAA Program or through and in coordination with the Workforce Innovation and Opportunity Act (WIOA) and Wagner Peyser as discussed in WIOA TEGL No. 3-15.~~

~~Trade-affected workers covered under a certified Trade Act petition that have been totally or partially separated from their jobs because of increase imports or a shift in production may be eligible to receive TAA benefits. If so, screen for TAA eligibility by requesting lay off documents (including petition number) and reemployment assistance documents. If worked in Florida pull CONNECT information; Look up the petition number in EFM or the DOL site if the worker (s) does not have the information. Request citizenship, social security card, driver license documents. With this information, complete a TAA application in EFM. If workers (s) are considering training provide the matrix information. Schedule TABE test. PROVIDE.~~

~~If the affected worker only wants employment, TAA Coordinator along with CORE Staff will assist with their job search. Schedule for resume and interviewing workshops. Consider OJT possibilities if needed to assist with re-employment. Close TAA to employment.~~

~~TAA Waivers are completed by the TAA Coordinator and transmitted along with a job search to the TRA Unit in Tallahassee for Florida affected workers or to the Liable state if the worker worked in another state. Waivers can only be completed for Training Enrollment Unavailable, Health and Training is not reasonable available. If waivers are completed pending training to protect benefits, waivers must be revoked once training begins.~~

~~TAA Program Coordinator provides training assistance to the worker if training is the direction the worker wants to explore. The assistance involves determining a career path; verify the training choices are on the Matrix. Schedule assessments, and review assessment results with worker. Proceed with enrollments in TAA Core and Intensive. If assessment supports~~

~~career path and it is on the Matrix, TAA Coordinator will advise the worker to contact the training provider for information concerning cost, required subjects, prerequisite subjects, remedial if worker requires remedial, support services if needed for the program of study and length of training; compare training cost with various training providers offering the same training for most cost effective training. Local TAA Coordinator will discuss the information obtained with the worker. If the worker meets the Six (6) Program Step Criteria the Local Coordinator will complete the Training Plan to include forms 2100ABC, 858 and Employability Development Plan in EFM. The completed Training Plan will be submitted to the TRA Unit in Tallahassee or to the Liable State (if out of state) for review and approval.~~

~~Request funds for Gazelle account, open Gazelle account, complete ITA's for student each Term/Semester. Maintain bi-weekly contact with student throughout each semester/term to ensure progress is satisfactory. Review student TRA Training Certification along with Progress/Attendance Sheets bi-weekly. Submit TRA Certs to the TRA Unit for review and determination for TRA/Income Support payments. Provide support services required for training program when requested. Review grades, and credentials, enter case notes in EFM. Once training is completed. Enter credentials in EFM. Complete follow-ups. Once employed close TAA file to employment. Complete retention.~~
~~Document files, and enter EFM case notes on Pertinent communication with worker to include updated phone numbers, addresses, career changes or updates. Copies in files of everything pertaining to training, schedules, grades, attendance sheets, credentials.~~

~~There is no cap; TAA Coordinator along with the worker always try to find the most cost effective training by reviewing career path, training needs and availability of training providers offering training services.~~

REFERENCE DOCUMENT(S)
LOCAL OPERATING PROCEDURE FOR POLICY #9

WORKFORCE INNOVATION AND OPPORTUNITY ACT POLICY #12
PARTICIPANT COMMUTING POLICY
ORIGINAL APPROVAL DATE: 8/11/2010
REVISION DATE: 11/07/2018~~5/12/2014~~
BOARD EFFECTIVE DATE: ~~8/25/2010~~

PURPOSE: The Workforce Innovation and Opportunity Act (WIOA) allows local workforce development boards to define the commuting area for employment and training. The purpose of this policy is to define the local commuting area as required for approving participant's training with local workforce development area (LWDA) eligible training providers. The Trade Adjustment Act (TAA) requires that the local workforce development boards define the commuting area for the purposes of granting adversely affected workers assistance with job search and training allowance when traveling outside of the commuting area.

REFERENCES: ~~Workforce Innovation and Opportunity Act (~~WIOA~~)~~ Section 20 CFR 617.22 (6)(iii)(c)

BACKGROUND: WIOA Section 20 CFR 617.22 (6)(iii)(c) indicates that funds shall be used to provide intensive services to adults and dislocated workers who are determined by a one-stop operator to be in need of such intensive services in order to obtain or retain employment that allows for self-sufficiency.

POLICY: Career Source Research Coast's (CSRC) ~~The~~ commuting area for the Local Workforce Development Area (LWDA) ~~will be set at~~ is 50 miles from ~~the~~ a participant's home. Eligibility to receive travel allowance for job search or training outside of the commuting area is determined by CSRC's local TAA Coordinator or designee. CSRC follows Department of Economic Opportunity's (DEO) most recent mileage allowance to determine the monetary amount the participant receives. Travel allowances are processed by DEO. ~~A training program for an individual must be at an approved training provider within the LWDA and within his or her commuting area.~~ Travel allowance for job search is based on documentation of no suitable jobs in the LWDA for the TAA participant. Travel allowance for training is based on the TAA participant's enrollment in a training program ~~Training may be approved at a provider~~ that is outside of the commuting area when there is a shortage of training or no~~ne~~ training exists in the LWDA. The Training program must be approved as ETP by CSRC before the TAA participant can receive the travel allowance. ~~Online courses or programs, regardless of their base of operations, are considered to be within the person's commuting area. Training programs must be on the region or state WIOA, Welfare Transition Program (WTP) or TAA eligible provider list.~~

DRAFT

REFERENCE DOCUMENT(S)
LOCAL OPERATING PROCEDURE FOR POLICY #12

CareerSource RESEARCH COAST

AGENDA ITEM #8

AGENDA ITEM SUMMARY

TITLE: Amendments and Updates to Welfare Transition (WT) Program Policies

STRATEGIC GOALS: Optimal Use of Resources

POLICY/PLAN/LAW: Temporary Assistance for Needy Families (TANF) State Plan/Board Policy

ACTION REQUESTED: Review and Approve the Amendments and Updates to the Board's WT Program Policies

BACKGROUND: The Florida Legislature consolidates the state workforce policy direction, oversight, and welfare support functions under one board, CareerSource Florida, Inc. (CSF) and designates the Department of Economic Opportunity (DEO) as the administrative, fiscal, and implementing agency for the Temporary Cash Assistance (TCA) function of TANF. The work activities and supportive services under the TCA function is the Welfare Transition (WT) Program. Local Workforce Development Boards (LWDBs) are responsible for the state's workforce programs to include WT. The LWDBs develop innovative WT programs tailored to the specific economic and employment needs of the communities they service. Therefore, flexibility is allowed under several of the requirements of the law in order for LWDBs to carry out the programs and services provided through the WT Program.

CareerSource Research Coast (CSRC) staff, follows the guidance of CSF and DEO, and makes recommendations to the CSRC Board of Directors to allow for this flexibility in order to meet the needs of our Local Workforce Development Area (LWDA). LWDAs must document their approved flexibility of the WT Program requirements through local policy.

As State and local initiatives under the law change or emerge, policies at the state and local levels need to be updated.

Many of the local CSRC WT Program policies include the local operating procedures that program staff must follow in order to carry out the policies. Often, through lessons learned, best practices, etc., the steps or operating procedures established to carry out the policies are changed. Any changes made to policies must be brought before the Programs & Services Committee, the Executive Committee and the full Board of Directors for approval. In order to expedite best practices, or to add procedures for a new initiative, CSRC staff is recommending that the local operating procedures be separated from the Board Policy it applies to. It is understood that all policies must be carried out as approved.

CareerSource RESEARCH COAST

AGENDA ITEM #8

AGENDA ITEM SUMMARY

CSRC Administration and program staff determined that several of the established CSRC WT Program Policies were actually local operating procedures as there was no flexibility allowed for the specific requirement.

STAFF RECOMMENDATION: Approve the Amended and Updated WT Program Policies.

SUPPORTING MATERIALS: WT Program Policies with amendments, updates and deletions.

A List of WT Program Policies to be converted to Local Operating Procedures to include the policies where no amendments to the actual policy were made (only the local operating procedural steps were removed).

BOARD STAFF: Glenda Harden, Senior Vice President of Operations
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CareerSource RESEARCH COAST

WELFARE TRANSITION ~~POLICY #2~~
INCENTIVE POLICY
ORIGINAL APPROVAL DATE: 8/10/2011
LATEST REVISION DATE: ~~3/15/2018~~11/7/2018
BOARD APPROVALDATE: ~~3/28/2018~~

PURPOSE:
The purpose of this policy is to establish ~~the~~ a uniform standard for ~~Boards'~~CareerSource Research Coast's (CSRC) use of Incentive Payments for Welfare Transition (WT) Program ~~(WTP)~~ participants. ~~The intent is to provide clarification on the proper procedures and documentation requirements for issuance of incentive payments to WTP participants.~~

REFERENCES:

Personal Responsibility and Work Opportunity Reconciliation Act~~,~~; Federal Regulations (45CFR 263.11(b), and Florida Statue 414.085.

BACKGROUND:
Florida Statutes allow L~~l~~ocal W~~w~~orkforce Development ~~b~~Boards (LWDBs) to provide incentives to ~~Welfare Transition~~WT p~~P~~articipants to complete assigned activities. In addition, the LWDBs may ~~and~~ determine the value of ~~these services~~the incentive payments and ~~set~~ create policies related to their use~~. This policy will provide guidance to CareerSource Research Coast (CSRC) staff on the use of incentive payments.~~.

POLICY:
It is the policy of CSRC to provide incentive payments to ~~Welfare Transition~~WT Program participants ~~incentives~~ to encourage the~~m to~~ complete~~e~~ion of activities ~~that will~~ leading ~~them~~ to self-sufficiency. Incentive payment amounts are based on the availability of funding. ~~The following requirements, guidelines and procedures are established with this policy.~~

~~1)~~ INCENTIVE PAYMENT REQUIREMENTS:

~~•~~ All participants must ~~be~~ either:
- R~~Currently r~~eceive~~ding~~ cash assistance benefits ~~for~~in the month the incentive is ~~paid~~ earned or
- C~~Participant's c~~ash assistance benefits closed within the previous three months from the date of request due to ~~the~~ earnings generated ~~by~~ from ~~the~~ employment~~. during the past three months~~
- ~~– AFEI Screen in Florida must show employment information and IQAA closure code must be 241, 242, or 244. (**This applies to Unsubsidized Job Placement Incentive Only**)~~

~~2)~~

WT PROGRAM~~P~~ INCENTIVE PAYMENTS AND AMOUNTS
CSRC provides the following incentives to WT participants as determined allowable and upon meeting the requirements listed for each:

~~3)~~
~~The following incentives may be earned by WTP participants:~~

- Obtainment of GED or high school diploma - $100.00
- College Degree, Applied Technical Diploma, Nationally Recognized Credential, Industry Certification or State License - ***Participants may not receive an incentive if they do not complete the related credential for the program of study*** - $100.00
- Unsubsidized Job Placement ~~- Participant's may receive:~~
  - ~~•~~○ ~~$400.00 F~~Placement Incentive for full time (30 hours or more) employment - $200
  - ~~•~~○ ~~$200.00 Placement Incentive for p~~Part time (29 hours or less) employment - $100
  - ~~At the completion of an OJT participant may receive a placement incentive if they retain unsubsidized employment with the OJT employer.~~
  - ~~Employment incentive will only be earned once in a WTP participant's lifetime.~~
  - ~~•~~○ Employment incentive will only be ~~submitted~~ requested after verification of employment and the receipt of the first full paystub.
- Completion of four consecutive weeks of participation (can be ongoing) - $~~50~~75.00.

- Completion of a resume approved by a CSRC ~~-~~Workshop Instructor and completion of three approved job readiness workshops~~.~~ ~~-~~ $50.00.
- Completion of three assessments in the Skills, Interests, and Proficiency Assessments workshop - $50.00
- Completion of each 75-hour Office Administration course - $~~125~~175.00
- ~~Completion of two consecutive weeks of job search and job readiness - $50~~Completion of two consecutive weeks of vocational training (can be ongoing) - $75

~~•~~

* The amount of incentive payments are subject to change based on the amount of Welfare Transition Program funding available and awarded to CSRC each program year.

~~4) PROCEDURE AND REQUIRED DOCUMENTATION~~

~~At the time a WTP participant has earned an incentive, the following documentation must be compiled:~~

- ~~All submissions must have a completed Performance Incentive Form as well as a screen shot of the IQCH screen from Florida.~~
- ~~Obtainment of GED - Must include a copy of the General Education Diploma~~
- ~~Credential - Must include a copy of the College Degree, Applied Technical Diploma, Nationally Recognized Credential, Industry Certification or State License - Participants may not receive an incentive if they do not complete the related credential for the program of study - i.e. LPN's must have a state license to obtain employment, Firefighters receive an applied Technical Diploma, Microsoft Certified Technology Specialist must have Microsoft Certification~~
- ~~Unsubsidized Job Placement - Must include a copy of a completed Employment Verification Form, first full paystub, or Work Number Verification - OSST will be reviewed to assure that employment information has been entered.~~
  - ~~OJT participant – must include completed Employment Verification Form reflecting they have retained unsubsidized employment with the OJT employer.~~
- ~~Four consecutive weeks of participation – The Career Planner must provide documentation of participation to the WTP Manager at the time of request.~~
- ~~Completion of resume and three workshops – Must include a copy of the resume approved by a Workshop Instructor and a Workshop Completion Form signed by a Workshop Instructor.~~
- ~~Completion of three assessments - Must include a Workshop Completion Form signed by a Workshop Instructor.~~
- ~~Two consecutive weeks of job search and job readiness - Must include a Workshop Completion Form signed by a Workshop Instructor, a copy of the resume approved by a Workshop Instructor, a full Employ Florida registration including an intake assessment with a staffing specialist, and documentation of two consecutive weeks of participation.~~

~~All required documentation must be compiled and submitted with a Gazelle check request *to* **Reward Card** signed by the Career Planner. The WTP Manager must give final approval. The original form will be kept in the participant's file and a copy of the form and all documentation will be returned to the Finance Department for processing. Bench Mark 6 must be entered and started in OSST for incentives.~~

REFERENCE DOCUMENTS:

~~•~~ ~~Performance Incentive Form~~

Local Operating Procedures for Welfare Transition Program: Incentive Payments

Local Operating Procedures for Welfare Transition Program: Issuance of Transportation Assistance and Incentive Payments

~~•~~ ~~Workshop Completion Form~~

CareerSource RESEARCH COAST

WELFARE TRANSITION ~~POLICY #11~~
~~PROCESS FOR~~ ISSUANCE OF TRANSPORTATION ASSISTANCE & INCENTIVE PAYMENTS
ORIGINAL APPROVAL DATE: 1/09/2007
REVISION DATE: ~~10~~3/~~01~~15/~~2018~~11/7/2018
BOARD EFFECTIVE DATE: ~~3/28/2018~~

PURPOSE

The purpose of this policy is to establish a uniform ~~-~~standard ~~procedures~~ for the issuance of transportation assistance payments and incentive payments to Welfare Transition (WT) Program participants. ~~in need and complying with program requirements.~~

REFERENCES

Florida Statute 445.025

BACKGROUND

Florida Statute allows local W~~w~~orkforce Development ~~b~~Boards (LWDBs) to provide transportation assistance and incentive~~s~~ payments to Welfare Transition (WT) participants who~~to~~ complete assigned activities. In addition, LWDBs may determine the ~~, to assign a reasonable monetary~~ value ~~to~~ of the ~~services~~incentive payments, transportation payments, and to ~~set~~ create policies related to their use. This policy defines the method transportation and incentive payments are issued~~will provide guidance to CareerSource Research Coast (CSRC) staff on the process of issuing transportation assistance and/or incentive payments~~ to eligible WT participants.

POLICY

~~C~~CSRC ~~shall~~ will coordinate and manage the provision of ~~cost-effective~~ transportation assistance payments and incentive payments ~~support services~~ to WT Program participants when appropriate funding is available. ~~CSRC shall authorize payments when a need has been identified and documented, when the participant may not be successful without these support services, when no other funding is available to pay for transportation assistance, and when the participant has complied with program requirements for incentives.~~CSRC provides transportation assistance and incentive payments to WT Program participants in the form of incentive cards. Upon receipt of the approved vouchers by the CSRC Finance Department, incentive cards in increments of $25 are issued to WT participants based on the amount of incentive earned.

~~Participants who are mandatory and have a completed one full week of participation or have obtained employment verified by the Career Planner will have a support account created in Gazelle. The Career Planner will forward the participant's name to the WT Program Manager, who will create the support account in Gazelle.~~

~~1. PROCESS FOR TRANSPORTATION ASSISTANCE *~~

~~• Participants may earn transportation assistance not to exceed **$** 75.00 every two weeks. Participants must have a minimum of 35 hours of approved work activity per week for two consecutive weeks documented and entered in the One Stop Service Tracking (OSST) system.~~

~~* The amount of transportation assistance payments are subject to change based on the amount of Welfare Transition Program funding available and awarded to CSRC each program year.~~

~~The career planner will create a check request through Gazelle. The following will outline the steps to create a voucher in Gazelle.~~

~~Enter the following on the **Add Check Request Voucher Screen** in Gazelle.~~

- ~~Select "Reward Card" as the Provider~~
- ~~Include a description of the payment type in the published comment section~~
- ~~Click on **Add New Line Item** and select "gas card", add quantity and dollar amount~~
- ~~Print the **Check Request Voucher** for the Career Planner to sign~~

- ~~Scan the voucher, Job Participation Rate (JPR) screenshot(s) for requested weeks, and all supporting participation documentation to the WT Program Manager for review and approval.~~
- ~~WT Program Manager will scan the approved voucher to the CSRC Finance Department and the respective Career Planner, who will scan to the participant's case file.~~

~~The Career Planner will document the transportation assistance in the **Skill Development Service Plan Screen** in OSST. The information will be entered as follows under the Transportation line:~~

- ~~Tracking Number from Gazelle (Example: **Identifier:** GZ184949399916)~~
- ~~Type: Transportation~~
- ~~Date~~
- ~~Cost~~
- ~~Click "save"~~

~~A case note must be entered in OSST to justify the payment and the amount. The case note must reflect the payment will be made in the form of "reward" cards and state the specific type of card.~~

~~All approved support check requests are due to the CSRC Finance Department **by noon every Tuesday** for the payment to be made during the same week.~~

~~If a participant receives a pre-penalty notice for non-compliance, the participant will have to demonstrate two consecutive weeks of compliance after the pre-penalty was issued before a request can be processed.~~

~~2. PROCESS FOR EARNED INCENTIVES~~

~~Participants may earn incentives based on compliance with their Individual Responsibility Plan and/or attainment of employment. See **WT Policy #2, "Incentive Policy"** for further details.~~

~~The career planner will create a check request through Gazelle. The following will outline the steps to create a voucher in Gazelle.~~

~~Enter the following on the **Add Check Request Voucher Screen** in Gazelle.~~

- ~~Select "Reward Card" as the Provider~~
- ~~Include a detailed description of the payment type in the published comment section~~
- ~~Click on **Add New Line Item** and select "incentive", add quantity and dollar amount~~
- ~~Print the **Check Request Voucher** for the Career Planner to sign~~
- ~~Scan the voucher, JPR screenshot(s) for requested weeks (if applicable), the Performance Incentive Request Form, and all supporting documentation to the WT Program Manager for review and approval.~~
- ~~WT Program Manager will scan the approved voucher to the CSRC Finance Department and the respective Career Planner, who will scan to the participant's case file.~~

~~The Career Planner will document the incentive payment in the **Skill Development Service Plan Screen** in OSST. The information will be entered as follows:~~

- ~~Benchmark 6 for the incentive and cost item~~
- ~~Tracking Number from Gazelle~~

~~(Example: **Identifier:** GZ184949399916)~~
- ~~Type: Other~~
- ~~FMTS Code (Participant Work Activities)~~
- ~~Date Initiated~~
- ~~Cost~~
- ~~Click "save"~~

~~A case note must be entered in OSST to justify the reason for the payment and the amount. The case note must state the payment will be made in the form of "reward" cards and state the specific type of card.~~

~~All approved support check requests are due to the CSRC Finance Department **by noon every Tuesday** for the payment to be made during the same week.~~

~~3.~~ ~~PROCESS FOR~~ DISTRIBUTION OF ~~"REWARD~~INCENTIVE~~"~~ CARDS

Upon receipt of the approved vouchers by the CSRC Finance Department, ~~"reward"~~ incentive cards in increments of $25 will be issued based on the amount ~~requested~~of incentive earned.

The cards, along with a receipt to be signed by the Career Planner and participant, will be delivered to the respective Career Planner (or the Career Planner can pick up at the CSRC Finance Department) ~~at the end of each week~~once they are issued by the CSRC Finance Department.

Once the Career Planner has signed for the ~~"reward"~~incentive cards, they will meet with the participant to issue the cards. The participant will be required to sign for the cards acknowledging receipt and responsibility of the cards. Once the participant and the Career Planner signs~~.~~ the form acknowledging receipt and responsibility, as ~~L~~**lost cards will not be replaced**, the Career Center Manager~~,~~ or their designee~~, or the Program Manager~~ must sign as verification that the participant signed for and received the reward card. ~~.~~ The Career Planner will scan the signed receipt to the CSRC Finance Department.

REFERENCE DOCUMENTS:
Welfare Transition Support Services Policy
Welfare Transition Incentive Policy
Local Operating Procedures for Welfare Transition Program: Support Services
Local Operating Procedures for Welfare Transition Program: Issuance of Transportation and Incentive Payments

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.

PURPOSE

The purpose of this policy is to establish a uniform standard for the delivery of support services to participants in the Welfare Transition (WT) Program ~~(WTP)~~**.**

Support services are allowable if it is determined these services are necessary to enable an individual to participate in activities and the services are not available from other sources.

BACKGROUND

Under the Temporary Assistance to Needy Families (TANF) State Plan (2017) and Florida Statute 445.025, support services enable families to remove barriers to participation in work or alternative requirement plan activities and employment, and to leave the program on the path to self-sufficiency. The ~~Regional~~ Local Workforce Development Boards (LWDB) develop policy and local operating procedures that prioritize support services based on the needs of individuals. ~~in the caseload.~~ Support services include:

1. Child-care for the hours of work activity or employment. Each family must contribute to the cost of child-care through a parent co-payment, using the fee schedule established by the local Early Learning Coalition. The children receiving care must be within the specified degree of relationship to the participant to be eligible to receive TANF-funded assistance and must be included in the assistance group.

2. Transportation expenses for participants include bus tokens or passes, transit vouchers, car repairs, and gasoline. Participants are paid for transportation in advance or reimbursed against receipts or invoices. If funds are available, providers may pay for vehicle operation and repair work expenditures necessary to make a vehicle ~~serviceable~~operable, vehicle registration, ~~and~~ driver license fees, and liability insurance for up to six months.

3. Ancillary Expenses. These may include books, tools, uniforms, ~~clothing,~~ education or training fees; background checks, drug screening or other costs to comply with employers' hiring conditions; or other expenses necessary to complete work or alternative plan activities.

LOCAL POLICY

For CareerSource Research Coast (CSRC), ~~S~~support ~~S~~services are based on the availability of funds. ~~In addition, there is a~~ The *Support Services* G~~g~~*uide* ~~which~~ establishes the ~~limitations~~ total ~~for support services~~ cost allowable for each type of support service provided. ~~per program year per participant. This guide may change throughout the program year due to funding constraints. Currently, support services cannot exceed $1,200 per program year per participant. *Please note in addition to Support Services, i*ncentive payments (see WT Policy #2 – Incentives) are also included in the $1,200 annual budget. At any time a special project/program is initiated, additional incentives may be granted upon approval of the Welfare Transition Program Manager and Vice President of Operations.~~

~~CareerSource Research Coast's (CSRC) Career Planners must always consider the following factors when requests for supportive services are submitted by participants:~~

- ~~Is the cost reasonable~~
- ~~Is the cost allowable, AND~~
- ~~Is it necessary~~

~~CareerSource Research Coast~~CSRC ~~may~~ provide~~s~~ the following support services to WT participants as determined necessary and allowable:

- Child-care assistance will follow the TANF State Plan as referenced in the Background section of this policy.
- Transportation support services will include:
  - Vehicle Repair
    - Repairs ~~will not include repair/maintenance for normal wear and tear of a vehicle. Repairs to automobiles~~ will be limited to the~~ose~~ parts ~~that~~ rendering the vehicle inoperable.~~.~~

- A w~~ The purchase of tires will be limited to only those that are deemed unsafe by a vehicle inspection. Note: CSRC will only authorize payment for car repair when a w~~ritten diagnostic/inspection must indicate~~s it is~~the repair necessary for the vehicle's safe operation.~~ of the vehicle.~~
- ~~All vehicle r~~Repairs valued at $500 or more must be approved by Administration.
- ~~Repairs to the vehicle cannot be completed prior to issuance of payment to the vendor as CSRC will not reimburse costs previously incurred.~~

- Vehicle registration
- Vehicle insurance
  - Limited to six months of liability insurance
- WT Program participants may earn **$75.00** in transportation (gas) assistance every two weeks. Participants are eligible for transportation assistance when two consecutive weeks of 35 hours of an approved work activity per week are completed.

- Ancillary Expenses will include:
  - Costs to comply with employer's hiring conditions
  - Uniforms, shoes, and boots for vocational training/education or employment
  - Tools for vocational training/education or employment
  - Necessary supplies for vocational training/education
  - Physicals for vocational training/education or employment
  - Immunizations for vocational training/education or employment
  - Accident insurance for vocational training/education programs
  - Exam and licensure fees for vocational training/education or employment
  - Background checks
  - Drug screening
  - Eye glasses
  - Emergency services by special request to enable a participant to fully participate in work activities

~~Career Planners will use appropriate judgment and review all requests for transportation support services to ensure the three (3) required price comparisons submitted are the most cost efficient. If such costs do not meet the criteria listed above, the support services will not be requested by the Career Planner. The Career Planner must clearly document in the One-Stop Service Tracking (OSST) system the reason for the denial of the support service. Management will review the denial in order to provide support and guidance to the Career Planners in their case management duties.~~

~~PROCESS~~

1. ~~The participant must be in need of the required support service and must be unable to obtain the service from any other source.~~
2. ~~The participant must be in compliance meeting the 35 hours weekly requirement with the program or employment of at least 25 hours per week.~~
3. ~~A need for support must be identified on the Individual Responsibility Plan and in the Needs and Barriers Section of OSST. It should also be determined by the Career Planner that the support service is needed to assist the participant on their path to obtain or retain self-sufficiency.~~
4. ~~A case note must be entered in OSST to support the reason for the support service expenditure.~~
5. ~~Please refer to the Welfare Transition Policy #11 in disbursing gas and incentive support. Participants must meet the required 35 hours per week in participation or employment of at least 25 hours per week to be deemed eligible for gas and incentive support.~~
6. ~~The Career Planner must complete a Support Services Review Checklist for a vehicle support services request.~~
7. ~~For all vehicle support services, the participant must review and sign the WTP Vehicle Support Service Request Form stating they understand the requirements in requesting vehicle support services.~~
8. ~~The participant will provide a Vehicle Diagnostic Inspection prior to acquiring three estimates for repair to ensure the proper repairs are to deem the vehicle operable.~~
9. ~~The Career Planner will determine if the vendor is an approved vendor listed in Gazelle. If not, the Career Planner must request a faxed copy of the W9 from the vendor. The W9 form must be faxed to the CSRC Administrative office. The~~

~~CSRC's Finance Department will verify the W9 and enter the provider information into Gazelle within 24 hours of receipt of the W9.~~

10. ~~The name of the support service, begin and end date, the cost, and the tracking number (if available) must be entered on the Skill Development Service Screen in OSST.~~
11. ~~The signed WTP Vehicle Support Service Request Form, a Support Service Review Checklist and a Support Service Expenditure Authorization and Approval Form must accompany the diagnostic, three estimates, a copy of the participant's driver's license, vehicle registration and insurance, and Gazelle voucher. These are to be submitted for approval to the WTP Manager.~~
12. ~~Expenditures under $500 must be approved by the WTP Manager. If the expenditure is approved and the service is provided, the Gazelle Voucher must be completed and then signed by the WTP Manager. This form along with all other relevant documentation must be sent to the Finance Department for payment processing.~~
13. ~~Expenditures $500 or more will follow the above procedure; however, the form along with other supporting documentation must be submitted to the Administrative Office for final payment and processing. Therefore, no repair can be completed on the vehicle until final approval is granted by the Administrative Office. Documentation must be provided by the participant to support the expenditure and will be maintained in the participant's file for all repairs. Once approved by the Administrative Office, all documentation will be batched and sent to the CSRC Finance Department for payment. The vendor will only be allowed to repair the vehicle upon receipt of the check/payment.~~
14. ~~If the participant requires childcare in order to participate, a childcare referral must be generated from OSST and forwarded to the Early Learning Coalition. While childcare is addressed in a separate work instruction, there are conditions and limits to childcare expenditures.~~
    a. ~~Childcare should be made available to all WTP participants as long as they are participating in a work activity and demonstrate a need for childcare.~~
    b. ~~Transitional childcare is available for employed participants for up to 12 months after the participant's cash is canceled due to employment. *Note: In order to receive Transitional Services, employment must be for a minimum of 25 hours per week.*~~

REFERENCE DOCUMENTS:

- ~~Vehicle Support Services Request~~
- ~~Support Services Expenditure – Authorization and Approval~~
- ~~Support Services Review Checklist~~

Support Services Cost ~~per Program Year Limits~~Guide
Local Operating Procedures for Welfare Transition Program: Support Services
Local Operating Procedures for Welfare Transition Program: Issuance of Transportation Assistance and Incentive Payments

-

- Ancillary Expenses will be provided as required by the vocational/education provider or employer. The allowable cost for each type of ancillary expense provided will be based on the local retail market value in LWDA 20. These expenses will include the following: ~~include:~~
  - Costs to comply with employer's hiring conditions
  - Uniforms, shoes, and boots for vocational training/education or employment
  - Tools for vocational training/education or employment
  - Necessary supplies for vocational training/education
  - Physicals for vocational training/education or employment
  - Immunizations for vocational training/education or employment
  - Accident insurance for vocational training/education programs
  - Exam and licensure fees for vocational training/education or employment
  - Background checks
  - Drug screening
  - Eye glasses
  - Emergency services by special request to enable a participant to fully participate in work activities and/or employment

Refer to the following documents:
~~**WTP - Support Services Cost Guide – November 2018**~~
WTP - Support Services Procedure – November 2018
WTP - Issuance of Transportation Assistance and Incentive Payments Procedure – November 2018

CareerSource RESEARCH COAST

INTERNAL FORM

SUPPORT SERVICES COST ~~PER PROGRAM YEAR LIMITS~~GUIDE

Service	Notes
Uniforms	As required by the vocational training/education provider or employer*~~2 tops 2 bottoms 1 lab coat - not to exceed $110~~
Uniforms for Fire Fighter Academy Only	As required by the vocational training/education provider or employer*~~2 shirts, 2 pants, 2 tees, 1 long sleeve tee, 2 shorts, 1 belt, 1 tie, 1 cap, set up for 3 tees, Letters are not included.~~
Tools & Supplies for Fire Fighter Academy only	As required by the vocational training/education or employment~~7/16' Rope - Length 12' to 15', firefighter gloves, Nomex Hood; Black Diamond knee boots; Bunker Gear (coat, pants, suspenders); FIT testing; SCBA face piece~~
Shoes	Uniform Shoes ~~(i.e., health students,)~~
Boots	Safety Steel Toe Boots
~~Hand t~~Tools	As required by the vocational training/education provider or employer*~~i.e. Wrenches, hammers etc. Excludes stethoscope, blood pressure cuff~~
Supplies - Exceptions per approval	As required by the vocational training/education provider or employer*~~Includes stethoscope, blood pressure cuff, art supplies. Office supplies, watches, or bandage scissors are not approved.~~
Exams~~Tests~~/ Licensure Fees~~es~~	As required by the vocational training/education provider or employer*
Background Check	As required by the vocational training/education provider or employer*
Physicals	As required by the vocational training/education provider or employer*~~Based on Health Dept. and Absolute Testing rates~~
Immunizations	As required by the vocational training/education provider or employer*~~Based on Health Dept. and Absolute Testing Rates. For Absolute Testing, students who will be attending IRSC will get the reduce rates.~~
Drug ~~Tests~~ Screenings	As required by the vocational training/education provider or employer*~~Based on Absolute Testing rates~~
Gas Cards	Per two-week period ~~all programs.~~
~~Car~~ Vehicle Repairs & Tires	~~Includes Car Registration – not to exceed $1000 total repair and registration - per Program Year~~As deemed necessary to obtain or retain employment and to complete work activities *
~~Car~~ Vehicle Registration	~~This cost is included in the total for Car Repair – not to exceed $1000 per program year~~Based on the cost determined by the Department of Motor Vehicles
Accident Insurance for programs	As required by the vocational training/education provider*
~~Car~~ Vehicle Insurance	~~Down payment only – no monthly payments~~Six months of liability insurance
Emergency Services	By special request to enable a participant to fully participate in work activities or employment~~By special request to manager and program director or program coordinator~~
Eye Glasses	Prescription and frames*

- ~~Graduation caps, gowns, graduation fees, or watches are not approved.~~*Based on the local retail market value in Local Development Area 20.

SUPPORT SERVICES COST ~~PER PROGRAM YEAR LIMITS~~GUIDE

- ~~We realize this will not cover the entire cost of services. Clients will need to pay the difference. Please assist clients in leveraging other dollars such as Pell Grants to cover the costs.~~

- ~~To receive any of the above services, a support service form must indicate the need for the service and that it cannot be paid for through other means. Be sure to complete the support service section and barrier section in OSST/EFM and if WIA, open the support service activity.~~

CareerSource RESEARCH COAST

WELFARE TRANSITION
SUPPORT SERVICES POLICY
ORIGINAL APPROVAL DATE: 1/22/2006
REVISION DATE: 11/07/2018
BOARD EFFECTIVE DATE: 5/29/2013

PURPOSE

The purpose of this policy is to establish a uniform standard for the delivery of support services to participants in the Welfare Transition (WT) Program**.**

Support services are allowable if it is determined these services are necessary to enable an individual to participate in activities and the services are not available from other sources.

BACKGROUND

Under the Temporary Assistance to Needy Families (TANF) State Plan and Florida Statute 445.025, support services enable families to remove barriers to participation in work or alternative requirement plan activities and employment, and to leave the program on the path to self-sufficiency. The Local Workforce Development Boards (LWDB) develop policy and local operating procedures that prioritize support services based on the needs of individuals. Support services include:

1. Childcare for the hours of work activity or employment. Each family must contribute to the cost of childcare through a parent co-payment, using the fee schedule established by the local Early Learning Coalition. The children receiving care must be within the specified degree of relationship to the participant to be eligible to receive TANF-funded assistance and must be included in the assistance group.

2. Transportation expenses for participants include bus tokens or passes, transit vouchers, car repairs, and gasoline. Participants are paid for transportation in advance or reimbursed against receipts or invoices. If funds are available, providers may pay for vehicle operation and repair work expenditures necessary to make a vehicle operable, vehicle registration, driver license fees, and liability insurance for up to six months.

3. Ancillary Expenses. These may include books, tools, uniforms, education or training fees; background checks, drug screening or other costs to comply with employers' hiring conditions; or other expenses necessary to complete work or alternative plan activities.

LOCAL POLICY

For CareerSource Research Coast (CSRC), support services are based on the availability of funds. The allowable cost for each type of support service provided is based on the local retail market value in Local Workforce Development Area (LWDA) 20. CSRC staff must perform cost comparisons to determine the most reasonable cost for each type of support service. ~~The *Support Services Guide* establishes the total cost allowable for each type of support service provided.~~

CSRC provides the following support services to WT participants as determined necessary and allowable:

- Childcare assistance will follow the TANF State Plan as referenced in the Background section of this policy.

- Transportation support services will include:
  - Vehicle Repair as deemed necessary for the WT participant to obtain, retain employment and/or to complete work activities.
    - Repairs will be limited to the parts rendering the vehicle inoperable.
    - A written diagnostic/inspection must indicate the repair necessary for the vehicle's safe operation.
    - Repairs valued at $500 or more must be approved by Administration.
    - Repairs to the vehicle cannot be completed prior to issuance of payment to the vendor as CSRC will not reimburse costs previously incurred.
  - Vehicle registration
  - Vehicle insurance
    - Limited to six months of liability insurance
  - WT Program participants may earn $75 in transportation (gas) assistance every two weeks. Participants are eligible for transportation assistance when two consecutive weeks of 35 hours of an approved work activity per week are completed.

SUPPORTING MATERIAL FOR P&S COMMITTEE MEETING 11/7/2018

WT Program Policies to be converted to Local Operating Procedures:

1. WT Job Search and Job Readiness Policy
2. WT Assigning Activities Policy

WT Program Policies with no significant amendments, local operating procedures removed only:

1. WTP Policy # 3 – Individual Responsibility Plan/Alternative Requirements
2. WTP Policy # 4 – Community Service Work Experience
3. WTP Policy # 5 – Participation Rate
4. WTP Policy # 6 – Work Registration
5. WTP Policy # 8 – Relocation Assistance
6. WTP Policy # 9 – Medical Incapacity
7. WTP Policy # 12 – Up-front Diversion
8. WTP Policy # 13 – Transitional Support Services
9. WTP Policy # 14 – Excused Absences

CareerSource RESEARCH COAST

WELFARE TRANSITION ~~POLICY #2~~
INCENTIVE POLICY
ORIGINAL APPROVAL DATE: 8/10/2011
LATEST REVISION DATE: ~~3/15/2018~~11/7/2018
BOARD APPROVALDATE: ~~3/28/2018~~

PURPOSE:
The purpose of this policy is to establish ~~the~~ a uniform standard for ~~Boards'~~CareerSource Research Coast's (CSRC) use of Incentive Payments for Welfare Transition (WT) Program ~~(WTP)~~ participants. ~~The intent is to provide clarification on the proper procedures and documentation requirements for issuance of incentive payments to WTP participants.~~

REFERENCES:

Personal Responsibility and Work Opportunity Reconciliation Act~~,~~; Federal Regulations (45CFR 263.11(b), and Florida Statue 414.085.

BACKGROUND:
Florida Statutes allow L~~l~~ocal W~~w~~orkforce Development ~~b~~Boards (LWDBs) to provide incentives to ~~Welfare Transition~~WT p~~P~~articipants to complete assigned activities. In addition, the LWDBs may ~~and~~ determine the value of ~~these services~~the incentive payments and ~~set~~ create policies related to their use~~. This policy will provide guidance to CareerSource Research Coast (CSRC) staff on the use of incentive payments.~~.

POLICY:
It is the policy of CSRC to provide incentive payments to ~~Welfare Transition~~WT Program participants ~~incentives~~ to encourage the~~m to~~ complete~~e~~ion of activities ~~that will~~ leading ~~them~~ to self-sufficiency. Incentive payment amounts are based on the availability of funding. ~~The following requirements, guidelines and procedures are established with this policy.~~

~~1)~~ INCENTIVE PAYMENT REQUIREMENTS:

~~•~~ All participants must ~~be~~ either:
- R~~Currently r~~eceive~~ding~~ cash assistance benefits ~~for~~in the month the incentive is ~~paid~~ earned or
- C~~Participant's c~~ash assistance benefits closed within the previous three months from the date of request due to ~~the~~ earnings generated ~~by~~ from ~~the~~ employment~~. during the past three months~~
- ~~– AFEI Screen in Florida must show employment information and IQAA closure code must be 241, 242, or 244. (**This applies to Unsubsidized Job Placement Incentive Only**)~~

~~2)~~

WT PROGRAM~~P~~ INCENTIVE PAYMENTS AND AMOUNTS
CSRC provides the following incentives to WT participants as determined allowable and upon meeting the requirements listed for each:

~~3)~~
~~The following incentives may be earned by WTP participants:~~

- Obtainment of GED or high school diploma - $100.00
- College Degree, Applied Technical Diploma, Nationally Recognized Credential, Industry Certification or State License - ***Participants may not receive an incentive if they do not complete the related credential for the program of study*** - $100.00
- Unsubsidized Job Placement ~~- Participant's may receive:~~
  - ~~•~~○ ~~$400.00 F~~Placement Incentive for full time (30 hours or more) employment - $200
  - ~~•~~○ ~~$200.00 Placement Incentive for p~~Part time (29 hours or less) employment - $100
  - ~~At the completion of an OJT participant may receive a placement incentive if they retain unsubsidized employment with the OJT employer.~~
  - ~~Employment incentive will only be earned once in a WTP participant's lifetime.~~
  - ~~•~~○ Employment incentive will only be ~~submitted~~ requested after verification of employment and the receipt of the first full paystub.
- Completion of four consecutive weeks of participation (can be ongoing) - $~~50~~75.00.

- Completion of a resume approved by a CSRC ~~-~~Workshop Instructor and completion of three approved job readiness workshops~~.~~ ~~-~~ $50.00.
- Completion of three assessments in the Skills, Interests, and Proficiency Assessments workshop - $50.00
- Completion of each 75-hour Office Administration course - $~~125~~175.00
- ~~Completion of two consecutive weeks of job search and job readiness - $50~~Completion of two consecutive weeks of vocational training (can be ongoing) - $75

~~•~~

* The amount of incentive payments are subject to change based on the amount of Welfare Transition Program funding available and awarded to CSRC each program year.

~~4) PROCEDURE AND REQUIRED DOCUMENTATION~~

~~At the time a WTP participant has earned an incentive, the following documentation must be compiled:~~

- ~~All submissions must have a completed Performance Incentive Form as well as a screen shot of the IQCH screen from Florida.~~
- ~~Obtainment of GED - Must include a copy of the General Education Diploma~~
- ~~Credential - Must include a copy of the College Degree, Applied Technical Diploma, Nationally Recognized Credential, Industry Certification or State License - Participants may not receive an incentive if they do not complete the related credential for the program of study - i.e. LPN's must have a state license to obtain employment, Firefighters receive an applied Technical Diploma, Microsoft Certified Technology Specialist must have Microsoft Certification~~
- ~~Unsubsidized Job Placement - Must include a copy of a completed Employment Verification Form, first full paystub, or Work Number Verification - OSST will be reviewed to assure that employment information has been entered.~~
  - ~~OJT participant – must include completed Employment Verification Form reflecting they have retained unsubsidized employment with the OJT employer.~~
- ~~Four consecutive weeks of participation – The Career Planner must provide documentation of participation to the WTP Manager at the time of request.~~
- ~~Completion of resume and three workshops – Must include a copy of the resume approved by a Workshop Instructor and a Workshop Completion Form signed by a Workshop Instructor.~~
- ~~Completion of three assessments - Must include a Workshop Completion Form signed by a Workshop Instructor.~~
- ~~Two consecutive weeks of job search and job readiness - Must include a Workshop Completion Form signed by a Workshop Instructor, a copy of the resume approved by a Workshop Instructor, a full Employ Florida registration including an intake assessment with a staffing specialist, and documentation of two consecutive weeks of participation.~~

~~All required documentation must be compiled and submitted with a Gazelle check request *to* **Reward Card** signed by the Career Planner. The WTP Manager must give final approval. The original form will be kept in the participant's file and a copy of the form and all documentation will be returned to the Finance Department for processing. Bench Mark 6 must be entered and started in OSST for incentives.~~

REFERENCE DOCUMENTS:

~~•~~ ~~Performance Incentive Form~~

Local Operating Procedures for Welfare Transition Program: Incentive Payments

Local Operating Procedures for Welfare Transition Program: Issuance of Transportation Assistance and Incentive Payments

~~•~~ ~~Workshop Completion Form~~

CareerSource RESEARCH COAST

WELFARE TRANSITION ~~POLICY #11~~
~~PROCESS FOR~~ ISSUANCE OF TRANSPORTATION ASSISTANCE & INCENTIVE PAYMENTS
ORIGINAL APPROVAL DATE: 1/09/2007
REVISION DATE: ~~10~~3/~~01~~15/~~2018~~11/7/2018
BOARD EFFECTIVE DATE: ~~3/28/2018~~

PURPOSE

The purpose of this policy is to establish a uniform ~~-~~standard ~~procedures~~ for the issuance of transportation assistance payments and incentive payments to Welfare Transition (WT) Program participants. ~~in need and complying with program requirements.~~

REFERENCES

Florida Statute 445.025

BACKGROUND

Florida Statute allows local W~~w~~orkforce Development ~~b~~Boards (LWDBs) to provide transportation assistance and incentive~~s~~ payments to Welfare Transition (WT) participants who~~to~~ complete assigned activities. In addition, LWDBs may determine the ~~, to assign a reasonable monetary~~ value ~~to~~ of the ~~services~~incentive payments, transportation payments, and to ~~set~~ create policies related to their use. This policy defines the method transportation and incentive payments are issued~~will provide guidance to CareerSource Research Coast (CSRC) staff on the process of issuing transportation assistance and/or incentive payments~~ to eligible WT participants.

POLICY

~~C~~CSRC ~~shall~~ will coordinate and manage the provision of ~~cost-effective~~ transportation assistance payments and incentive payments ~~support services~~ to WT Program participants when appropriate funding is available. ~~CSRC shall authorize payments when a need has been identified and documented, when the participant may not be successful without these support services, when no other funding is available to pay for transportation assistance, and when the participant has complied with program requirements for incentives.~~CSRC provides transportation assistance and incentive payments to WT Program participants in the form of incentive cards. Upon receipt of the approved vouchers by the CSRC Finance Department, incentive cards in increments of $25 are issued to WT participants based on the amount of incentive earned.

~~Participants who are mandatory and have a completed one full week of participation or have obtained employment verified by the Career Planner will have a support account created in Gazelle. The Career Planner will forward the participant's name to the WT Program Manager, who will create the support account in Gazelle.~~

~~1. PROCESS FOR TRANSPORTATION ASSISTANCE *~~

~~• Participants may earn transportation assistance not to exceed **$** 75.00 every two weeks. Participants must have a minimum of 35 hours of approved work activity per week for two consecutive weeks documented and entered in the One Stop Service Tracking (OSST) system.~~

~~* The amount of transportation assistance payments are subject to change based on the amount of Welfare Transition Program funding available and awarded to CSRC each program year.~~

~~The career planner will create a check request through Gazelle. The following will outline the steps to create a voucher in Gazelle.~~

~~Enter the following on the **Add Check Request Voucher Screen** in Gazelle.~~

- ~~Select "Reward Card" as the Provider~~
- ~~Include a description of the payment type in the published comment section~~
- ~~Click on **Add New Line Item** and select "gas card", add quantity and dollar amount~~
- ~~Print the **Check Request Voucher** for the Career Planner to sign~~

- ~~Scan the voucher, Job Participation Rate (JPR) screenshot(s) for requested weeks, and all supporting participation documentation to the WT Program Manager for review and approval.~~
- ~~WT Program Manager will scan the approved voucher to the CSRC Finance Department and the respective Career Planner, who will scan to the participant's case file.~~

~~The Career Planner will document the transportation assistance in the **Skill Development Service Plan Screen** in OSST. The information will be entered as follows under the Transportation line:~~

- ~~Tracking Number from Gazelle (Example: **Identifier:** GZ184949399916)~~
- ~~Type: Transportation~~
- ~~Date~~
- ~~Cost~~
- ~~Click "save"~~

~~A case note must be entered in OSST to justify the payment and the amount. The case note must reflect the payment will be made in the form of "reward" cards and state the specific type of card.~~

~~All approved support check requests are due to the CSRC Finance Department **by noon every Tuesday** for the payment to be made during the same week.~~

~~If a participant receives a pre-penalty notice for non-compliance, the participant will have to demonstrate two consecutive weeks of compliance after the pre-penalty was issued before a request can be processed.~~

~~2. PROCESS FOR EARNED INCENTIVES~~

~~Participants may earn incentives based on compliance with their Individual Responsibility Plan and/or attainment of employment. See **WT Policy #2, "Incentive Policy"** for further details.~~

~~The career planner will create a check request through Gazelle. The following will outline the steps to create a voucher in Gazelle.~~

~~Enter the following on the **Add Check Request Voucher Screen** in Gazelle.~~

- ~~Select "Reward Card" as the Provider~~
- ~~Include a detailed description of the payment type in the published comment section~~
- ~~Click on **Add New Line Item** and select "incentive", add quantity and dollar amount~~
- ~~Print the **Check Request Voucher** for the Career Planner to sign~~
- ~~Scan the voucher, JPR screenshot(s) for requested weeks (if applicable), the Performance Incentive Request Form, and all supporting documentation to the WT Program Manager for review and approval.~~
- ~~WT Program Manager will scan the approved voucher to the CSRC Finance Department and the respective Career Planner, who will scan to the participant's case file.~~

~~The Career Planner will document the incentive payment in the **Skill Development Service Plan Screen** in OSST. The information will be entered as follows:~~

- ~~Benchmark 6 for the incentive and cost item~~
- ~~Tracking Number from Gazelle~~

~~(Example: **Identifier:** GZ184949399916)~~
- ~~Type: Other~~
- ~~FMTS Code (Participant Work Activities)~~
- ~~Date Initiated~~
- ~~Cost~~
- ~~Click "save"~~

~~A case note must be entered in OSST to justify the reason for the payment and the amount. The case note must state the payment will be made in the form of "reward" cards and state the specific type of card.~~

~~All approved support check requests are due to the CSRC Finance Department **by noon every Tuesday** for the payment to be made during the same week.~~

~~3.~~ ~~PROCESS FOR~~ DISTRIBUTION OF ~~"REWARD~~INCENTIVE~~"~~ CARDS

Upon receipt of the approved vouchers by the CSRC Finance Department, ~~"reward"~~ incentive cards in increments of $25 will be issued based on the amount ~~requested~~of incentive earned.

The cards, along with a receipt to be signed by the Career Planner and participant, will be delivered to the respective Career Planner (or the Career Planner can pick up at the CSRC Finance Department) ~~at the end of each week~~once they are issued by the CSRC Finance Department.

Once the Career Planner has signed for the ~~"reward"~~incentive cards, they will meet with the participant to issue the cards. The participant will be required to sign for the cards acknowledging receipt and responsibility of the cards. Once the participant and the Career Planner signs~~.~~ the form acknowledging receipt and responsibility, as ~~L~~**lost cards will not be replaced**, the Career Center Manager~~,~~ or their designee~~, or the Program Manager~~ must sign as verification that the participant signed for and received the reward card. ~~.~~ The Career Planner will scan the signed receipt to the CSRC Finance Department.

REFERENCE DOCUMENTS:
Welfare Transition Support Services Policy
Welfare Transition Incentive Policy
Local Operating Procedures for Welfare Transition Program: Support Services
Local Operating Procedures for Welfare Transition Program: Issuance of Transportation and Incentive Payments

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.

PURPOSE

The purpose of this policy is to establish a uniform standard for the delivery of support services to participants in the Welfare Transition (WT) Program ~~(WTP)~~**.**

Support services are allowable if it is determined these services are necessary to enable an individual to participate in activities and the services are not available from other sources.

BACKGROUND

Under the Temporary Assistance to Needy Families (TANF) State Plan (2017) and Florida Statute 445.025, support services enable families to remove barriers to participation in work or alternative requirement plan activities and employment, and to leave the program on the path to self-sufficiency. The ~~Regional~~ Local Workforce Development Boards (LWDB) develop policy and local operating procedures that prioritize support services based on the needs of individuals. ~~in the caseload.~~ Support services include:

1. Child-care for the hours of work activity or employment. Each family must contribute to the cost of child-care through a parent co-payment, using the fee schedule established by the local Early Learning Coalition. The children receiving care must be within the specified degree of relationship to the participant to be eligible to receive TANF-funded assistance and must be included in the assistance group.

2. Transportation expenses for participants include bus tokens or passes, transit vouchers, car repairs, and gasoline. Participants are paid for transportation in advance or reimbursed against receipts or invoices. If funds are available, providers may pay for vehicle operation and repair work expenditures necessary to make a vehicle ~~serviceable~~operable, vehicle registration, ~~and~~ driver license fees, and liability insurance for up to six months.

3. Ancillary Expenses. These may include books, tools, uniforms, ~~clothing,~~ education or training fees; background checks, drug screening or other costs to comply with employers' hiring conditions; or other expenses necessary to complete work or alternative plan activities.

LOCAL POLICY

For CareerSource Research Coast (CSRC), ~~S~~support ~~S~~services are based on the availability of funds. ~~In addition, there is a~~ The *Support Services* G~~g~~*uide* ~~which~~ establishes the ~~limitations~~ total ~~for support services~~ cost allowable for each type of support service provided. ~~per program year per participant. This guide may change throughout the program year due to funding constraints. Currently, support services cannot exceed $1,200 per program year per participant. *Please note in addition to Support Services, i*ncentive payments (see WT Policy #2 – Incentives) are also included in the $1,200 annual budget. At any time a special project/program is initiated, additional incentives may be granted upon approval of the Welfare Transition Program Manager and Vice President of Operations.~~

~~CareerSource Research Coast's (CSRC) Career Planners must always consider the following factors when requests for supportive services are submitted by participants:~~

- ~~Is the cost reasonable~~
- ~~Is the cost allowable, AND~~
- ~~Is it necessary~~

~~CareerSource Research Coast~~CSRC ~~may~~ provide~~s~~ the following support services to WT participants as determined necessary and allowable:

- Child-care assistance will follow the TANF State Plan as referenced in the Background section of this policy.
- Transportation support services will include:
  - Vehicle Repair
    - Repairs ~~will not include repair/maintenance for normal wear and tear of a vehicle. Repairs to automobiles~~ will be limited to the~~ose~~ parts ~~that~~ rendering the vehicle inoperable.~~.~~

- A w~~ The purchase of tires will be limited to only those that are deemed unsafe by a vehicle inspection. Note: CSRC will only authorize payment for car repair when a w~~ritten diagnostic/inspection must indicate~~s it is~~the repair necessary for the vehicle's safe operation.~~ of the vehicle.~~
- ~~All vehicle r~~Repairs valued at $500 or more must be approved by Administration.
- ~~Repairs to the vehicle cannot be completed prior to issuance of payment to the vendor as CSRC will not reimburse costs previously incurred.~~

- Vehicle registration
- Vehicle insurance
  - Limited to six months of liability insurance
- WT Program participants may earn **$75.00** in transportation (gas) assistance every two weeks. Participants are eligible for transportation assistance when two consecutive weeks of 35 hours of an approved work activity per week are completed.

- Ancillary Expenses will include:
  - Costs to comply with employer's hiring conditions
  - Uniforms, shoes, and boots for vocational training/education or employment
  - Tools for vocational training/education or employment
  - Necessary supplies for vocational training/education
  - Physicals for vocational training/education or employment
  - Immunizations for vocational training/education or employment
  - Accident insurance for vocational training/education programs
  - Exam and licensure fees for vocational training/education or employment
  - Background checks
  - Drug screening
  - Eye glasses
  - Emergency services by special request to enable a participant to fully participate in work activities

~~Career Planners will use appropriate judgment and review all requests for transportation support services to ensure the three (3) required price comparisons submitted are the most cost efficient. If such costs do not meet the criteria listed above, the support services will not be requested by the Career Planner. The Career Planner must clearly document in the One-Stop Service Tracking (OSST) system the reason for the denial of the support service. Management will review the denial in order to provide support and guidance to the Career Planners in their case management duties.~~

~~PROCESS~~

1. ~~The participant must be in need of the required support service and must be unable to obtain the service from any other source.~~
2. ~~The participant must be in compliance meeting the 35 hours weekly requirement with the program or employment of at least 25 hours per week.~~
3. ~~A need for support must be identified on the Individual Responsibility Plan and in the Needs and Barriers Section of OSST. It should also be determined by the Career Planner that the support service is needed to assist the participant on their path to obtain or retain self-sufficiency.~~
4. ~~A case note must be entered in OSST to support the reason for the support service expenditure.~~
5. ~~Please refer to the Welfare Transition Policy #11 in disbursing gas and incentive support. Participants must meet the required 35 hours per week in participation or employment of at least 25 hours per week to be deemed eligible for gas and incentive support.~~
6. ~~The Career Planner must complete a Support Services Review Checklist for a vehicle support services request.~~
7. ~~For all vehicle support services, the participant must review and sign the WTP Vehicle Support Service Request Form stating they understand the requirements in requesting vehicle support services.~~
8. ~~The participant will provide a Vehicle Diagnostic Inspection prior to acquiring three estimates for repair to ensure the proper repairs are to deem the vehicle operable.~~
9. ~~The Career Planner will determine if the vendor is an approved vendor listed in Gazelle. If not, the Career Planner must request a faxed copy of the W9 from the vendor. The W9 form must be faxed to the CSRC Administrative office. The~~

~~CSRC's Finance Department will verify the W9 and enter the provider information into Gazelle within 24 hours of receipt of the W9.~~

10. ~~The name of the support service, begin and end date, the cost, and the tracking number (if available) must be entered on the Skill Development Service Screen in OSST.~~
11. ~~The signed WTP Vehicle Support Service Request Form, a Support Service Review Checklist and a Support Service Expenditure Authorization and Approval Form must accompany the diagnostic, three estimates, a copy of the participant's driver's license, vehicle registration and insurance, and Gazelle voucher. These are to be submitted for approval to the WTP Manager.~~
12. ~~Expenditures under $500 must be approved by the WTP Manager. If the expenditure is approved and the service is provided, the Gazelle Voucher must be completed and then signed by the WTP Manager. This form along with all other relevant documentation must be sent to the Finance Department for payment processing.~~
13. ~~Expenditures $500 or more will follow the above procedure; however, the form along with other supporting documentation must be submitted to the Administrative Office for final payment and processing. Therefore, no repair can be completed on the vehicle until final approval is granted by the Administrative Office. Documentation must be provided by the participant to support the expenditure and will be maintained in the participant's file for all repairs. Once approved by the Administrative Office, all documentation will be batched and sent to the CSRC Finance Department for payment. The vendor will only be allowed to repair the vehicle upon receipt of the check/payment.~~
14. ~~If the participant requires childcare in order to participate, a childcare referral must be generated from OSST and forwarded to the Early Learning Coalition. While childcare is addressed in a separate work instruction, there are conditions and limits to childcare expenditures.~~
    a. ~~Childcare should be made available to all WTP participants as long as they are participating in a work activity and demonstrate a need for childcare.~~
    b. ~~Transitional childcare is available for employed participants for up to 12 months after the participant's cash is canceled due to employment. *Note: In order to receive Transitional Services, employment must be for a minimum of 25 hours per week.*~~

REFERENCE DOCUMENTS:

- ~~Vehicle Support Services Request~~
- ~~Support Services Expenditure – Authorization and Approval~~
- ~~Support Services Review Checklist~~

Support Services Cost ~~per Program Year Limits~~Guide
Local Operating Procedures for Welfare Transition Program: Support Services
Local Operating Procedures for Welfare Transition Program: Issuance of Transportation Assistance and Incentive Payments

-

- Ancillary Expenses will be provided as required by the vocational/education provider or employer. The allowable cost for each type of ancillary expense provided will be based on the local retail market value in LWDA 20. These expenses will include the following: ~~include:~~
  - Costs to comply with employer's hiring conditions
  - Uniforms, shoes, and boots for vocational training/education or employment
  - Tools for vocational training/education or employment
  - Necessary supplies for vocational training/education
  - Physicals for vocational training/education or employment
  - Immunizations for vocational training/education or employment
  - Accident insurance for vocational training/education programs
  - Exam and licensure fees for vocational training/education or employment
  - Background checks
  - Drug screening
  - Eye glasses
  - Emergency services by special request to enable a participant to fully participate in work activities and/or employment

Refer to the following documents:
~~**WTP - Support Services Cost Guide – November 2018**~~
WTP - Support Services Procedure – November 2018
WTP - Issuance of Transportation Assistance and Incentive Payments Procedure – November 2018

CareerSource RESEARCH COAST

INTERNAL FORM

SUPPORT SERVICES COST ~~PER PROGRAM YEAR LIMITS~~GUIDE

Service	Notes
Uniforms	As required by the vocational training/education provider or employer*~~2 tops 2 bottoms 1 lab coat - not to exceed $110~~
Uniforms for Fire Fighter Academy Only	As required by the vocational training/education provider or employer*~~2 shirts, 2 pants, 2 tees, 1 long sleeve tee, 2 shorts, 1 belt, 1 tie, 1 cap, set up for 3 tees, Letters are not included.~~
Tools & Supplies for Fire Fighter Academy only	As required by the vocational training/education or employment~~7/16' Rope - Length 12' to 15', firefighter gloves, Nomex Hood; Black Diamond knee boots; Bunker Gear (coat, pants, suspenders); FIT testing; SCBA face piece~~
Shoes	Uniform Shoes ~~(i.e., health students,)~~
Boots	Safety Steel Toe Boots
~~Hand t~~Tools	As required by the vocational training/education provider or employer*~~i.e. Wrenches, hammers etc. Excludes stethoscope, blood pressure cuff~~
Supplies - Exceptions per approval	As required by the vocational training/education provider or employer*~~Includes stethoscope, blood pressure cuff, art supplies. Office supplies, watches, or bandage scissors are not approved.~~
Exams~~Tests~~/ Licensure Fees~~es~~	As required by the vocational training/education provider or employer*
Background Check	As required by the vocational training/education provider or employer*
Physicals	As required by the vocational training/education provider or employer*~~Based on Health Dept. and Absolute Testing rates~~
Immunizations	As required by the vocational training/education provider or employer*~~Based on Health Dept. and Absolute Testing Rates. For Absolute Testing, students who will be attending IRSC will get the reduce rates.~~
Drug ~~Tests~~ Screenings	As required by the vocational training/education provider or employer*~~Based on Absolute Testing rates~~
Gas Cards	Per two-week period ~~all programs.~~
~~Car~~ Vehicle Repairs & Tires	~~Includes Car Registration – not to exceed $1000 total repair and registration - per Program Year~~As deemed necessary to obtain or retain employment and to complete work activities *
~~Car~~ Vehicle Registration	~~This cost is included in the total for Car Repair – not to exceed $1000 per program year~~Based on the cost determined by the Department of Motor Vehicles
Accident Insurance for programs	As required by the vocational training/education provider*
~~Car~~ Vehicle Insurance	~~Down payment only – no monthly payments~~Six months of liability insurance
Emergency Services	By special request to enable a participant to fully participate in work activities or employment~~By special request to manager and program director or program coordinator~~
Eye Glasses	Prescription and frames*

- ~~Graduation caps, gowns, graduation fees, or watches are not approved.~~*Based on the local retail market value in Local Development Area 20.

SUPPORT SERVICES COST ~~PER PROGRAM YEAR LIMITS~~GUIDE

- ~~We realize this will not cover the entire cost of services. Clients will need to pay the difference. Please assist clients in leveraging other dollars such as Pell Grants to cover the costs.~~

- ~~To receive any of the above services, a support service form must indicate the need for the service and that it cannot be paid for through other means. Be sure to complete the support service section and barrier section in OSST/EFM and if WIA, open the support service activity.~~

CareerSource RESEARCH COAST

WELFARE TRANSITION
SUPPORT SERVICES POLICY
ORIGINAL APPROVAL DATE: 1/22/2006
REVISION DATE: 11/07/2018
BOARD EFFECTIVE DATE: 5/29/2013

PURPOSE

The purpose of this policy is to establish a uniform standard for the delivery of support services to participants in the Welfare Transition (WT) Program**.**

Support services are allowable if it is determined these services are necessary to enable an individual to participate in activities and the services are not available from other sources.

BACKGROUND

Under the Temporary Assistance to Needy Families (TANF) State Plan and Florida Statute 445.025, support services enable families to remove barriers to participation in work or alternative requirement plan activities and employment, and to leave the program on the path to self-sufficiency. The Local Workforce Development Boards (LWDB) develop policy and local operating procedures that prioritize support services based on the needs of individuals. Support services include:

1. Childcare for the hours of work activity or employment. Each family must contribute to the cost of childcare through a parent co-payment, using the fee schedule established by the local Early Learning Coalition. The children receiving care must be within the specified degree of relationship to the participant to be eligible to receive TANF-funded assistance and must be included in the assistance group.

2. Transportation expenses for participants include bus tokens or passes, transit vouchers, car repairs, and gasoline. Participants are paid for transportation in advance or reimbursed against receipts or invoices. If funds are available, providers may pay for vehicle operation and repair work expenditures necessary to make a vehicle operable, vehicle registration, driver license fees, and liability insurance for up to six months.

3. Ancillary Expenses. These may include books, tools, uniforms, education or training fees; background checks, drug screening or other costs to comply with employers' hiring conditions; or other expenses necessary to complete work or alternative plan activities.

LOCAL POLICY

For CareerSource Research Coast (CSRC), support services are based on the availability of funds. The allowable cost for each type of support service provided is based on the local retail market value in Local Workforce Development Area (LWDA) 20. CSRC staff must perform cost comparisons to determine the most reasonable cost for each type of support service. ~~The *Support Services Guide* establishes the total cost allowable for each type of support service provided.~~

CSRC provides the following support services to WT participants as determined necessary and allowable:

- Childcare assistance will follow the TANF State Plan as referenced in the Background section of this policy.

- Transportation support services will include:
  - Vehicle Repair as deemed necessary for the WT participant to obtain, retain employment and/or to complete work activities.
    - Repairs will be limited to the parts rendering the vehicle inoperable.
    - A written diagnostic/inspection must indicate the repair necessary for the vehicle's safe operation.
    - Repairs valued at $500 or more must be approved by Administration.
    - Repairs to the vehicle cannot be completed prior to issuance of payment to the vendor as CSRC will not reimburse costs previously incurred.
  - Vehicle registration
  - Vehicle insurance
    - Limited to six months of liability insurance
  - WT Program participants may earn $75 in transportation (gas) assistance every two weeks. Participants are eligible for transportation assistance when two consecutive weeks of 35 hours of an approved work activity per week are completed.

SUPPORTING MATERIAL FOR P&S COMMITTEE MEETING 11/7/2018

WT Program Policies to be converted to Local Operating Procedures:

1. WT Job Search and Job Readiness Policy
2. WT Assigning Activities Policy

WT Program Policies with no significant amendments, local operating procedures removed only:

1. WTP Policy # 3 – Individual Responsibility Plan/Alternative Requirements
2. WTP Policy # 4 – Community Service Work Experience
3. WTP Policy # 5 – Participation Rate
4. WTP Policy # 6 – Work Registration
5. WTP Policy # 8 – Relocation Assistance
6. WTP Policy # 9 – Medical Incapacity
7. WTP Policy # 12 – Up-front Diversion
8. WTP Policy # 13 – Transitional Support Services
9. WTP Policy # 14 – Excused Absences

CareerSource RESEARCH COAST

AGENDA ITEM #9

AGENDA ITEM SUMMARY

TITLE: Amendment and Update to the Supplemental Nutrition Assistance Program (SNAP) Requirements Policy

STRATEGIC GOALS: Optimal Use of Resources

POLICY/PLAN/LAW: Personal Responsibility and Work Opportunity Reconciliation Act of 1996 and the SNAP Employment and Training (E&T) Florida State Plan for Federal Fiscal Year 2018/Board Policy

ACTION REQUESTED: Review and Approve the Amendment and Update to the Board's SNAP Program Requirements Policy

BACKGROUND: The SNAP E&T program is funded by the United States Department of Agriculture (USDA), Food and Nutrition Services (FNS). Florida's SNAP E&T program is designed to assist eligible SNAP E&T participants obtain skills through education, training, or work experience that will increase self-sufficiency and lead to employment. The Florida Department of Economic Opportunity (DEO), in partnership with the local workforce development boards (LWDB), is responsible for the administration of SNAP E&T.

A SNAP participant is an Able-Bodied Adult Without Dependents (ABAWD) who is required to participate in work activities in order to maintain eligibility for food assistance. An ABAWD:

- Is between ages 18-49
- Is not in school at least half-time
- Does not work at least 20 hours a week
- Does not earn at least $217.50 a week
- Does not have a documented medical limitation
- Does not meet other criteria, outlined by federal regulations, that prevents them from working

The SNAP program offers ABAWDs the opportunity to meet the mandatory work requirements of 80 hours a month through participation in qualifying activities offered by the LWDBs.

This policy defines the frequency and schedule of the initial appointments required for ABAWDs. CSRC also offers group orientations regarding our local SNAP Program. This policy also clarifies the method for documenting work requirement hours for education and vocational training.

STAFF RECOMMENDATION: Approve the Amended and Updated SNAP Program Policy. Staff is also recommending the local operating procedure be removed from the Board policy as a separate document.

CareerSource RESEARCH COAST

AGENDA ITEM #9

AGENDA ITEM SUMMARY

SUPPORTING MATERIALS: SNAP Program Policy with amendments, updates and deletions.

BOARD STAFF: Glenda Harden, Senior Vice President of Operations
gharden@careersourcerc.com 866-482-4473 ext. 427

SUPPLEMENTAL NUTRITION ASSISTANCE PROGRAM ~~POLICY #1~~
PROGRAM REQUIREMENTS POLICY
ORIGINAL APPROVAL DATE: 3/9/2016
REVISION DATE: ~~02/12/2018~~11/7/2018
CSRC EFFECTIVE DATE: ~~4/27/2016~~

PURPOSE

The purpose of this ~~procedure~~ policy is to provide guidance to CareerSource Research Coast (CSRC) in operating the Supplemental Nutrition Assistance Program (SNAP)~~,~~ in accordance with the Personal Responsibility and Work Opportunity Reconciliation Act of 1996 and the ~~-~~SNAP Employment and Training (E&T) Florida State Plan for Federal Fiscal Year 201~~87~~.

LOCAL POLICY

~~REFERENCES~~

~~Personal Responsibility and Work Opportunity Reconciliation Act of 1996 and the SNAP Employment and Training Florida State Plan for Federal Fiscal Year 2017.~~

~~PROCEDURE AND PROCESS~~

~~Program Operation~~PROGRAM OPERATION~~:~~

~~CareerSource Research Coast (~~CSRC~~)~~ will operate a mandatory SNAP program with designated Career Planners who will provide services from each CSRC Career Center throughout ~~the~~ Local Workforce Development Area (LWDA) 20.~~Region from one of the local CSRC Career Centers.~~ ~~–~~Services will be provided to Able Bodied Adults w~~W~~ithout Dependents (ABAWDs), also known as SNAP participants, ~~–~~who are referred by the Florida~~the~~ Department of Children and Families (DCF) for participation.

~~:~~

~~Initial Engagement:~~INITIAL ENGAGEMENT

~~Once the ABAWD has been referred by DCF and receives a Notice of Mandatory Participation (NOMP), each ABAWD will complete an online Orientation and Assessment by logging into the One Stop Service Tracking (OSST) system client website within seven days of the initial DCF referral. Upon completion of the online Orientation and Assessment, the ABAWD will be required to schedule an initial appointment via the OSST client website within seven days of the initial DCF referral and complete the initial appointment within 14 days.~~ ~~–~~Initial appointments are offered ~~, four days a week, with one day a week at each of the local~~weekly on designated days at each ~~–~~CSRC Career Center~~s~~. ~~during a block of four hours and can accommodate up to 15 ABAWDs at each session.~~Prior to each participant's initial appointment, ~~–~~the CSRC Career Planner presents a group orientation tailored to the local service delivery method. ~~During this block of time, a group orientation will precede the individual initial appointment with a SNAP Career Planner. The time designated for the orientation/initial appointments may be adjusted on occasions of inclement weather, holidays or other extenuating circumstances.~~

~~**Prior to each of the orientation/initial appointment sessions, a SNAP Career Planner will review the list of ABAWDs who have registered. If the ABAWD is not registered, they will not be seen. For those ABAWDs who have registered, they will attend the SNAP orientation provided by a SNAP Career Planner. After the orientation, each ABAWD will be seen individually by a SNAP Career Planner in the order they arrived. Veterans will be provided priority of service and be seen first. The SNAP Career Planner will confirm the ABAWD has completed the required online components and close the initial appointment activity. Each ABAWD will complete an orientation packet to include, but not limited to, the Opportunities and Obligations, local grievance form, dress code policy and information regarding food stamp reimbursements. A copy of the signed grievance form outlining the local procedure will be given to the ABAWD at the appointment.**~~

~~**During the initial appointment, the SNAP Career Planner will provide a brief overview of the program expectations and requirements. ABAWDs will be highly encouraged to utilize MyTESS to monitor their progress, receive and send messages from/to their SNAP Career Planner, and to upload documentation. The SNAP Career Planner and ABAWD will review the ABAWD's current activities. The SNAP Career Planner will**~~

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.

~~**assign additional activities, if necessary, to meet the requirements of the program. The ABAWD will be given the relevant paperwork e.g., employment verification form, or informed of the documentation needed, e.g., school registration/schedule, based on current/future activities to have completed by a due date set by the SNAP Career Planner.**~~

~~**If at any time it is determined by the SNAP Career Planner an ABAWD should be evaluated for an exemption or exception from the program, the ABAWD will be instructed to contact DCF and the SNAP Career Planner will also notify the local DCF contact via email.**~~

~~**Orientation/Assessment Components:**~~

~~**CareerSource Research Coast will partner with community partners to refer ABAWDs to support programs. Referrals to other programs such as Welfare Transition, Workforce Innovation and Opportunity Act (WIOA), Vocational Rehabilitation, Adult Education and Literacy, and the Trade Adjustment Act will be utilized to ensure ABAWDs can access training opportunities and skill enhancements needed to obtain and retain employment. CareerSource Research Coast offers a variety of assessment options including TABE and online skill and interest inventories.**~~

~~**During the initial appointment, the SNAP Career Planner will review the results of the online assessment with the ABAWD. The SNAP Career Planner will use the assessment results to identify strengths and skills to assist in assigning appropriate activities to the ABAWD. For example, if an ABAWD is without a high school diploma or GED, they will be referred to enroll in and attend a GED class. Those considered dislocated workers will be referred to WIOA, while those needing job readiness skills will be assigned to workshops, Virtual Job Shadow, My Career Shines and/or other applicable online resources. Other identified community and online resources will be utilized for those who have language or computer literacy barriers. Those who need ESOL (English as a Second Language) services will be referred to Indian River State College for St. Lucie and Martin Counties and to the Indian River County School District for Indian River County or assigned to courses online to assist with learning the English language.**~~

~~**Program Activities:**~~ **PROGRAM ACTIVITIES**

CSRC assigns program activities to SNAP participants in accordance with the SNAP E&T Florida State Plan for Federal Fiscal Year 2018. ~~CareerSource Research Coast~~CSRC will offer the following ~~components~~program activities: Job Search, Job Search Training, Education and Vocational Training, and Work Experience.

All program activities follow the guidance of the SNAP E&T State Plan guidance accordingly with the exception of Education and Vocational Training.

~~**Job Search:**~~

~~After completion of the initial requirements, unless already employed, the ABAWD will be assigned to job search combined with other allowable activities, as job search is limited to less than half (39) of the required monthly hours (80).~~

~~The job search component will include the following:~~

- ~~* Completing applications~~
- ~~* Submitting resumes~~
- ~~* Meeting with staff for referrals to employers~~
- ~~* Contacting employers about job opportunities~~
- ~~* Attending interviews~~
- ~~* Attending job fairs and~~
- ~~* Other activities directly related to securing employment, such as searching for jobs using the internet.~~

~~To meet the job search requirement, CareerSource Research Coast will place an eight month time limit associated with job search as an activity. ABAWDs will be expected to participate in job search activities for no more than nine hours each week. A limit of up to 1 hour for each job search will be given. All participation hours will be tracked on~~

~~the job search form and hours will be captured in OSST on the Job Participation Rate screen. ABAWDs will be required to provide written documentation, e.g., email confirmation, verifying an application was made for each job contact. Documentation will be submitted to the SNAP Career Planner via MyTESS, email, fax or in person.~~

~~If the ABAWD has not found employment during the first seven months of the job search activity, during the eighth month he/she will be assessed for engagement in an education or training component to improve job skills utilizing local assessments such as My Career Shines, TABE, etc…~~

~~Job Search Training:~~

~~Job Search Training (JST) can be utilized at any time as long as it is combined with another allowable activity, as JST is also limited to less than half (39) of the required monthly hours (80). JST should be utilized when it is determined an ABAWD is in need of improving their ability to obtain a job or maintain employability. JST may include but is not limited to the following:~~

- ~~* Workshops~~
- ~~* Employability skills~~
- ~~* Life skills~~
- ~~* Interpersonal skills~~
- ~~* Time management~~
- ~~* Decision making skills~~
- ~~* Basic job seeking skills~~
- ~~* Job retention skills~~
- ~~* Interviewing skills~~
- ~~* Resume development~~
- ~~* Appropriate dress~~
- ~~* My Career Shines (online)~~
- ~~* Virtual Job Shadowing (online)~~
- ~~* Career assessments; and~~
- ~~* Career planning.~~

~~ABAWDs will be given the necessary information to participate in JST, such as log in information, workshop referrals, etc… by a SNAP Career Planner.~~

~~Documentation in the form of an attendance sheet or a usage report for online activities will be used to validate the requirements. All participation hours will be tracked on the attendance sheet or usage report and hours will be captured in OSST on the Job Participation Rate screen. Documentation will be submitted to the SNAP Career Planner via MyTESS, email, fax or in person.~~

~~Work Experience:~~

~~Work Experience (WE) is a structured learning experience that takes place in a workplace for a limited period of time. The purpose of WE is to give an individual an opportunity to practice work readiness skills, newly obtained occupational skills or simply re-enter employment. WE will be unpaid. In lieu of wages, the ABAWD receives compensation in the form of their household's monthly food assistance allotment. WE may be in a private for profit sector, the non-profit private sector, or the public sector.~~

~~Outreach will be made to community partners and local businesses/organizations via the CSRC website, the Transitional Employment Coordinator, social media, etc… regarding their interest in being a part of the WE program. Interested parties will be contacted by a CSRC staff, who will visit the worksite and provide an overview of the program. If the worksite agrees to participate, the agreement will be signed by both parties and a job description will be provided by or developed with the employer. CSRC staff will ensure the worksite, and the ABAWD, understands the ABAWD is not allowed to perform more than the assigned hours given to them based on their worksite calculation.~~

~~Documentation will be in the form of a weekly timesheet that will require daily entries for completed hours, the signature of an approved supervisor and the signature of the ABAWD. All participation hours will be tracked on the timesheet and hours will be captured in OSST on the Job Participation Rate screen. Documentation will be submitted to the SNAP Career Planner via MyTESS, email, fax or in person.~~

Education and Vocational Training:

~~At the time of the ABAWD's initial referral, if they are enrolled in an educational or vocational training program, they will be allowed to continue and the hours of attendance will account for some or all of their required monthly hours. The ABAWD must provide to their Career Planner proof of their enrollment with a copy of their school schedule/registration outlining the class dates to include days and times of the classes each week.~~

Participants who utilize the Alison.com website directly may experience a "glitch" in the calculation of hours completed and are awarded a disproportionate number of hours for the week. If this occurs, the CSRC Career Planner may provide the participant with the maximum number of course completion hours indicated on the specific module(s) completed. The Career Planner will document the reason the hours are not accepted on the paperwork submitted by the participant and in a case note.

~~Online education courses via Alison may also be utilized as assigned by the SNAP Career Planner. Approved Alison courses are attached to this policy. Career Planner will utilize the time tracking component provided by the Alison.com website. ABAWD's will be required to complete the assigned Alison course and submit a copy of the course completion certificate in order to receive hourly credit.~~

~~For education and vocational activities the ABAWD actually attends, documentation will be in the form of a weekly class attendance sheet signed by the class instructor, teacher's assistant, lab instructor, lab assistant, clinical supervisor or a designated party at the school submitting hours on behalf of the institution. Alison will be documented utilizing a certificate of completion. . All participation hours will be tracked as noted above and hours will be captured in OSST on the Job Participation Rate screen. Documentation will be submitted to the SNAP Career Planner via MyTESS, email, fax or in person.~~

Participants attending classroom training under this program activity may be eligible to receive one hour of study time for each hour of class attendance completed on his/her weekly time sheet.

~~Employment:~~

~~If an ABAWD is employed at the time of the initial referral from DCF or gains employment after, the ABAWD will be given an Employment Verification Form (EVF) to be completed by the employer. The ABAWD will provide the completed EVF to the SNAP Career Planner and they will record the employment information in the OSST system. If the number of hours do not disqualify the ABAWD from participating in the program, additional activities will be assigned, if needed, to meet the monthly requirement of 80 hours.~~

~~Documentation will be in the form of the paystub received by the ABAWD. All participation hours will be tracked with the paystub and hours will be captured in OSST on the Job Participation Rate screen. Documentation will be submitted to the SNAP Career Planner via MyTESS, email, fax or in person.~~

~~Food Stamp Reimbursement (FSR):~~

~~CareerSource Research Coast will follow established procedures to ensure ABAWDs are reimbursed in a timely manner for expenses related to participation in a SNAP E&T activity or a combination of SNAP E&T activities based upon the established amount for the participation specific activities or components each month for allowable costs based on need. Food Stamp Reimbursement (FSR) needs will be evaluated during the initial assessment and throughout the ABAWD's involvement with the SNAP E&T program. Reimbursements will be authorized by the SNAP Career Planner.~~

~~ABAWDs who are participating in the program will be eligible to receive the FSR based on a demonstrated need for the reimbursement and engagement in appropriate activities. ABAWDs may also receive an FSR for traveling to complete Orientation and Assessment.~~

~~If the ABAWD travels to complete the Orientation and Assessment process, they may be reimbursed up to $12.50 in transportation expenses.~~

~~If the ABAWD travels to complete only Orientation on one day and Assessment on a different day, they may be reimbursed up to $12.50 in transportation expense for each day.~~

~~If the ABAWD travels to attend Orientation and Assessment and also participates in a program component during the same month, they may be reimbursed up to $25 in transportation expenses for the month.~~

~~Reimbursements will not exceed $25 in one "earned" month. The earned month is the calendar month in which the activity hours were completed and documented.~~

~~In order to receive an FSR, ABAWDs must provide documentation verifying participation in program components and documentation they incurred a transportation cost while participating in an activity.~~

~~Acceptable forms of documentation include:~~

> ~~**Gas Receipts**~~
> ~~SNAP Career Planners must review gas receipts closely to ensure they are requesting the correct reimbursement; they are requesting the reimbursement for **gas only**; and the date on the receipt coincides with the date(s) the ABAWD participated in the component.~~
>
> ~~**Bus Pass Receipts**~~
> ~~ABAWDs must provide proof they purchased the bus pass, such as a receipt. The bus pass itself is not sufficient as documentation of purchase.~~
>
> ~~**Self-Attestation Form**~~
> ~~Self-Attestation forms are allowable and **must** include: Dollar amount spent on transportation by the ABAWD to complete program components; the month the reimbursement was earned; the qualifying component; and ABAWD's signature, SNAP Career Planner's signature, and the date.~~

~~Prior to being placed in a component, ABAWDs receive written notification of the opportunity to claim actual expenses up to the maximum levels for each component with documentation proving the expense occurred.~~

~~**Documenting the Need for Food Stamp Reimbursement:**~~
~~CareerSource Research Coast will follow established procedures to ensure ABAWDs are reimbursed in a timely manner for expenses related to participation. The FSRs are entered directly into the OSST system by utilizing the FSR link. Documentation of the identified need for reimbursement will be entered in the OSST system case notes, as well as, the month, activity, and hours completed to receive the FSR. Documentation requirements for submitting an FSR are as follows:~~

> ~~* Job Search/Job Search Training form/usage report~~
> ~~* Vocational and Educational class attendance sheet/usage report/certificate of completion~~
> ~~* WE timesheet~~
> ~~* Paystubs~~
> ~~* Receipts of the expense the ABAWD is requesting reimbursement and/or~~
> ~~* Attestation Form~~

~~**Dress Code Policy:**~~
~~ABAWDs are given written information regarding the dress code during the initial appointment with the SNAP Career Planner.~~

~~If a need is identified, a referral can be given to the ABAWD to a local organization to provide outfits as needed. If an ABAWD continuously does not comply with the dress code (after the initial appointment and/or referrals given), they will not be permitted to enter the CSRC office or meet with their SNAP Career Planner.~~

~~**Compliance:**~~
~~Each SNAP Career Planner will have at least two files monitored on a monthly basis. The results of the monitoring will be shared in writing with the respective Career Planner. A response, to include all corrections made, is required within seven calendar days.~~

~~CSRC also has a contracted, private monitoring firm that conducts monitoring at least twice annually. A random sample of files are selected by the firm and a formal report is completed and shared with CSRC regarding the results. Observations and findings are addressed by the program and a written response detailing corrective action is provided to the monitoring firm.~~

REFERENCE DOCUMENTS:
Local Operating Procedures SNAP: Program Requirements

CareerSource RESEARCH COAST

AGENDA ITEM #10

AGENDA ITEM SUMMARY

TITLE: CareerSource Research Coast (CSRC) Primary Indicators of Performance for Program Years (PYs) 2018 - 2019 and 2019 - 2020

STRATEGIC GOALS: Clear, Credible and Trustworthy Commitments and Projects

POLICY/PLAN/LAW: Workforce Innovation and Opportunity Act (WIOA) Title I Programs and Title III Wagner-Peyser (WP) Act; Training and Employment Guidance Letter No. 09-17

ACTION REQUESTED: For Information and Review

BACKGROUND: The State of Florida must negotiate and agree upon levels of performance for WIOA programs and WP Act funded activities for PYs 2018-2019 and 2019-20 with the United States Department of Labor, Employment and Training Administration. Once the State levels are agreed upon, CareerSource Florida (CSF) and the Department of Economic Opportunity (DEO) must negotiate and reach agreements with Local Workforce Areas on local levels of performance for these PYs.

The CSRC Administrative Team chose to negotiate the proposed levels of performance applied to our workforce area with CSF and DEO.

STAFF RECOMMENDATION: For Information and Review Only

SUPPORTING MATERIALS: CSRC PY 2018 – 2020 Local performance Levels Negotiation Response

BOARD STAFF: Glenda Harden, Senior Vice President of Operations
gharden@careersourcerc.com 866-482-4473 ext. 427

Rick Scott
GOVERNOR

FLORIDA DEPARTMENT of ECONOMIC OPPORTUNITY

Cissy Proctor
EXECUTIVE DIRECTOR

M E M O R A N D U M

DATE: July 6, 2018

TO: Local Workforce Development Board (LWDB) Executive Directors

FROM: Shila A. Salem, Chief, Bureau of One-Stop and Program Support

SUBJECT: LWDB Primary Indicators of Performance Negotiations for Program Years (PY) 2018-19 and 2019-20

As discussed in the June 14, 2018 monthly LWDB Management Teleconference, CareerSource Florida and the Department of Economic Opportunity will provide an opportunity for LWDBs to negotiate local Workforce Innovation and Opportunity Act and Wagner-Peyser primary indicators of performance for PY's 2018-2019 and 2019-2020.

If you are interested in negotiating the proposed level of performance for your local area, please use the hyperlink below to navigate to the LWDB primary indicators of performance negotiations registration calendar to review the available dates/times and select a date for negotiating performance targets for your local board.

On this web page, you will find instructions for selecting your preferred date/time and completing the scheduling process. Please select a date by **Wednesday, July 13, 2018**.

Primary Indicators of Performance Negotiations Registration Calendar: https://www.eventbrite.com/e/local-workforce-development-board-performance-negotiations-registration-tickets-47711843408

If you select to negotiate, please note that the state's negotiated primary indicators of performance levels for PY 18-19 and PY 19-20 will be the baseline for any negotiations. LWDBs must provide a rationale for negotiating a lower primary indicator of performance.

LWDBs are not required to negotiate and may choose to accept the state's proposed primary indicators of performance. LWDBs that do not wish to negotiate must provide an email to Kathy Keeton (contact information below) by **July 13, 2018** acknowledging acceptance of the state's proposed primary indicators of performance.

If you have questions, please contact Kathy Keeton via email at Kathy.Keeton@deo.myflorida.com. Thank you in advance for your cooperation and assistance.

Attachment : Florida PY 18 and PY 19 Agreed Upon Goals Letter from USDOL

cc: Andrew Collins Mary Lazor Taylor Hatch Shila Salem Casey Penn Daniel Harper

An equal opportunity employer/program. Auxiliary aids and service are available upon request to individuals with disabilities. All voice telephone numbers on this document may be reached by persons using TTY/TTD equipment via the Florida Relay Service at 711.

PY 2018 - 2020 Local Performance Levels Negotiation Response

Local Workforce Development Board (LWDB): 20	**Career Source Research Coast**
LWDB Contact Name:	Brian Bauer
LWDB Contact Phone:	866-482-4473
LWDB Contact Email:	bbauer@careersourcerc.com

Measures	PY 2018-2019 Performance Levels	PY 2019-2020 Performance Levels
Adults:		
Employed 2nd Qtr After Exit	**85.0%**	**85.2%**
Employed 4th Qtr After Exit	**82.5%**	**83.0%**
Median Wage 2nd Quarter After Exit	**$7,000**	**$7,000**
Credential Attainment Rate	**63.0%**	**66.0%**
Dislocated Workers:		
Employed 2nd Qtr After Exit	**81.0%**	**82.0%**
Employed 4th Qtr After Exit	**78.0%**	**79.0%**
Median Wage 2nd Quarter After Exit	**$6,700**	**$6,850**
Credential Attainment Rate	**65.0%**	**68.0%**
Youth:		
Education and Employed 2nd Qtr After Exit	**75.0%**	**75.5%**
Education and Employed 4th Qtr After Exit	**69.0%**	**69.2%**
Credential Attainment Rate	**75.2%**	**75.5%**
Wagner-Peyser:		
Employed 2nd Qtr After Exit	**63.0%**	**63.2%**
Employed 4th Qtr After Exit	**62.0%**	**64.0%**
Median Wage 2nd Quarter After Exit	**$4,850**	**$5,000**